CFRE
CERTIFIED FUND RAISING EXECUTIVE
Approved Provider for Continuing Education 2023

CONTINUING EDUCATION POINTS TRACKER

CFRE International has developed this form as a way for you to quickly track (and keep in your files!) the continuing education sessions you have attended. Simply check the boxes next to the sessions you attended. At the end of the conference, add up the total number of hours. Keep this sheet and you will be ready to complete your application form. All of the session slots listed are eligible for continuing education points on your CFRE application for initial certification and/or recertification. Sessions not listed here are not eligible for points.

Activity Organizer: - **Canadian Association of Gift Planners (CAGP)**
Title of Activity: **- Gift Planning Fundamentals for AHP**
Names of Presenter(s): **- Paul Nazareth, MFA-P**
Dates and Location: **- 24 May, 2023 in Toronto, ON**

Date: 24 May, 2023

Session 1: 8:00 am – 10:00 am (2.0 pts)
☐ **-** Introduction
☐ - Key Concepts
☐ - Practicing the conversation with donors regarding their interests

Session 2: 10:30 am – 12:15 pm (1.75 pts)
☐ **-** Publicly listed securities
☐ - Charitable Bequests
☐ - Practicing the conversation with donors regarding gifts in a will

Session 3: 1:15 pm – 3:00 pm (1.75 pts)
☐ - Gifts of Registered Funds
☐ - Gifts of Life Insurance
☐ - Charitable Gift Annuities
☐ - Gifts in Kind
☐ - Case study in groups

Session 4: 3:30 pm – 5:00 pm (1.5 pts)
☐ - Where to Donate
☐ - Involving Others
☐ - Personal Action Plan

Total number of points attained: _____

Courses Marked **NFR** (Non Fundraising Related) may be counted towards the 10 point maximum of NFR Courses on the initial CFRE application and the 5 point maximum on the re-certification application.

Find more **CFRE approved** continuing education opportunities on **My Education Finder**:
http://www.cfre.org/continuing-education/my-education-finder/