



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: - Association for Healthcare Philanthropy
Title of Activity: - AHP Virtual Institute - Planned Giving
Names of Presenter(s): - Various
Dates and Location: - August 10 - August 27, 2021, Online

Date: Tuesday, August 10, 2021

Session 1: 11:30 am - 2:30 pm (2.75 pts)

- Welcome / The Promise of Planned Giving / Putting the Ask in Context (1.5 points)
- Engaging Diverse Constituencies / Discussion (1.25 pts)

Date: Friday, August 27, 2021

Session 5: 12:00 pm - 1:30 pm (1.5 pts)

- Session 5: Next Steps for Your Planned Giving Program (1.5 pts)

Date: Friday, August 13, 2021

Session 2: 12:00 pm - 2:30 pm (2.25 pts)

- Gifts Donors Can Change / Gifts Donors Cannot Change (1.25 pts)
- Taxes and Planned Giving / Discussion (1.0 pts)

Date: Tuesday, August 17, 2021

Session 3: 12:00 pm - 2:30 pm (2.25 pts)

- Planned Gift Marketing / Working with Professional Advisors (1.25 pts)
- Creating Your Annual Activity Plan / Discussion (1.0 pts)

Date: Friday, August 20, 2021

Session 4: 12:00 pm - 2:45 pm (2.5 pts)

- Discovery & Cultivation / Starting the Planned Giving Conversation / Stewarding Planned Gifts (1.5 pts)
- Ethics (1.0 pts)

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/>