

Association for Healthcare Philanthropy Madison Institute

Planned Giving Track

2023

Core Faculty:

Johni Hays, JD, FCEP

Karen Piel, JD, CFRE

Charles Slamar, Jr., JD, LLM, FCEP, Dean

Sunday, July 16	Topic/Activity	Faculty
1:00 – 5:00 pm	Registration – Pyle Center, AT&T Lounge Room 106	
5:00 – 6:30 pm	Making the Most of the Madison Experience and Ice Breaker	All Faculty
6:30 – 7:45 pm	Networking Social – Pyle Center, Alumni Lounge	

Monday, July 17	Topic/Activity	Faculty
7:00 – 8:00 AM	Breakfast – Great Hall, Memorial Union	
8:00 – 9:00 AM	General Session – Great Hall, Memorial Union	
9:00 – 10:00 AM	The Promise of Planned Giving and Factors Motivating Planned Gifts	Karen Piel
10:00 – 10:30 AM	Putting the Ask in Context	Charles Slamar
10:30 – 10:45 AM	Refreshment Break	
10:45 – 12:00 PM	The Charitable Gift Toolbox	Johni Hays
12:00 – 1:00 PM	Lunch – Pyle Center, Alumni Lounge and Lee Lounge	
1:00 – 2:30 PM	Engaging Diverse Constituencies in Legacy Planning	All Faculty
2:30 – 3:00 PM	Class Activity	
3:00 – 3:15 PM	Refreshment Break	
3:15 – 4:15 PM	Taxes and Planned Giving	Charles Slamar
4:15 – 5:00 PM	Gifts from IRAs/Retirement Plans	Johni Hays
5:00 – 6:00 PM	Networking Social – Pyle Center, Courtyard or Alumni Lounge (Rain Location)	
Evening	Dinner on your own	

**All sessions and breaks are in Pyle Center unless otherwise noted.*

Tuesday, July 18	Topic	Faculty
7:00 – 7:30 AM	Breakfast – Great Hall, Memorial Union	
7:30 – 8:30 AM	General Session – Great Hall, Memorial Union	Dr. Angelique Grant
9:00 – 9:30 AM	Open Class Time with Faculty	All Faculty
9:30 – 10:30 AM	Gifts Donor Can Change: Will, Trusts and Beneficiary Designations	Johni Hays
10:30 – 10:45 AM	Refreshment Break	
10:45 – 12:15 PM	Gift Donors Cannot Change: Life Income Gifts (Charitable Gift Annuities and Charitable Remainder Trusts)	Johni Hays
12:15 – 1:15 PM	Lunch – Pyle Center, Alumni Lounge and Lee Lounge	
1:15 – 2:00 PM	Gifts Donors Cannot Change: Lead Trusts, Bargain Sales and Retained Life Estates	Charles Slamar
2:00 – 2:45 PM	Class Activity	
2:45 – 3:00 PM	Refreshment Break	
3:00 – 4:00 PM	Receiving Planned Gifts: Estate Administration 101	Karen Piel
4:00 – 5:00 PM	Gifts from Donor Advised Funds; Gifts of Life Insurance; and other Miscellaneous Gift Types	Charles Slamar
5:00 – 6:00 pm	Networking Social – Pyle Center, Courtyard or Alumni Lounge (Rain Location)	
Evening	Dinner on your own	

Wednesday, July 19	Topic	Faculty
7:00 – 7:30 AM	Breakfast – Great Hall, Memorial Union	
7:30 – 8:30 AM	General Session – Great Hall, Memorial Union	HIPAA – Donna Budak PIPEDA – Lesley Heighway
8:45 – 9:45 AM	Planned Gift Marketing Tools	Karen Piel
9:45 – 10:00 AM	Refreshment Break	
10:00 -11:00 AM	Developing a PG Marketing Plan	Johni Hays
11:00-11:30 AM	Planned Gift Marketing Roundtable	All
11:30-12:30 PM	“Open Mic – Session 1”	All
12:30 PM	Boxed Lunches Available – Pyle Center, AT&T Lounge Room 106	
Free afternoon and evening		

Thursday, July 20	Topic	Faculty
7:30 – 8:30 AM	Breakfast – Pyle Center	
8:45 – 9:00 AM	Class Photo	
9:00 – 10:30 AM	Cultivating and Soliciting Planned Gifts	Johni Hays
10:30 – 10:45 AM	Refreshment Break	
10:45 – 12:00 PM	Ethics/Class Activity	Charles Slamar
12:00 – 1:00 PM	Lunch – Pyle Center, Alumni Lounge and Lee Lounge	
1:00 – 1:30 PM	Stewarding Planned Gifts	Johni Hays
1:30 – 2:15 PM	Working with Professional Advisors	Karen Piel
2:15 – 2:30 PM	Refreshment Break	
2:30 – 4:00 PM	Integrating Family and Charitable Legacies in Estate Plans	All Faculty
4:00 – 5:00 PM	Class Activity – Blended Gifts	
5:00 – 6:30 pm	Closing Celebration Social Hour – Pyle Center, Courtyard or Alumni Lounge (Rain Location)	
Evening	Dinner on your own	

Friday, July 21	Topic	Faculty
7:30 – 8:30 AM	Breakfast – Pyle Center	
8:30 - 9:30 AM	Tracking, Managing and Reporting Planned Gifts; Engaging your Board in Planned Giving	Karen Piel
9:30 - 10:15 AM	Preparing Your Annual Activity Plan	Charles Slamar
10:15 - 10:30 AM	Refreshment Break	
10:30 AM – 11:30 AM	“Open Mic – Session 2”	All
11:30 – 12:00 PM	Presentation of Certificates and Farewells	