

**Association for Healthcare Philanthropy
Madison Institute**

Planned Giving Track

2022

Core Faculty:

Karen Piel, JD, CFRE, Dean
Charles Slamar, Jr., JD, LLM, Associate Dean
Lorraine del Prado, CSPG, CFRE, FCEP, Emeritus Associate Dean
Damon Tinnon, CSPG

Guest Speakers/Faculty:

Johni Hays, JD, FCEP

| Sunday, July 17 | Topic/Activity | Faculty |
|-----------------|---|-------------|
| 1:00 – 5:00 pm | Registration | |
| 5:00 – 6:30 pm | Making the Most of the Madison Experience and Ice Breaker | All Faculty |
| 6:30 – 7:45 pm | Networking Social | |

| Monday, July 18 | Topic/Activity | Faculty |
|------------------|--|--------------------|
| 7:00 – 8:00 AM | Breakfast – Great Hall, Memorial Union | |
| 8:00 – 9:00 AM | General Session/Opening Keynote – Great Hall, Memorial Union | |
| 9:15 – 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 | Damon Tinnon |
| 12:00 – 1:00 PM | Lunch | |
| 1:00 – 2:30 PM | Engaging Diverse Constituencies in Legacy Planning | Lorraine del Prado |
| 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 | |
| | | |
| Evening | Dinner on your own | |

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

| Tuesday, July 19 | Topic | Faculty |
|-------------------------|---|--------------------|
| 7:30 – 9:00 AM | Breakfast & General Session – Great Hall, Memorial Union | |
| 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 | Damon Tinnon |
| 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) | Lorraine del Prado |
| 12:15 – 1:15 PM | Lunch | |
| 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 | |
| | | |
| Evening | Dinner on your own | |

| Wednesday, July 20 | Topic | Faculty |
|----------------------------|--|--------------|
| 7:30 – 9:00 AM | Breakfast & General Session – Great Hall, Memorial Union | |
| 9:00 – 9:30 AM | Open Class Time with Faculty | All Faculty |
| 9:30 – 10:15 AM | Planned Gift Marketing Tools | Karen Piel |
| 10:15 – 10:30 AM | Refreshment Break | |
| 10:30 – 12:00 PM | Planned Gift Marketing Continued | TBD |
| 12:00 – 1:00 PM | Developing a PG Marketing Plan | Damon Tinnon |
| 1:00 – 2:00 PM | Lunch | |
| | | |
| Free afternoon and evening | | |

| Thursday, July 21 | Topic | Faculty |
|-------------------|--|--------------------|
| 7:30 – 8:30 AM | Breakfast – Great Hall, Memorial Union | |
| 8:30 – 9:00 AM | Open Class Time with Faculty and Class Photo | All Faculty |
| 9:00 – 10:30 AM | Cultivating and Soliciting Planned Gifts | Lorraine del Prado |
| 10:30 – 10:45 AM | Refreshment Break | |
| 10:45 – 12:00 PM | Ethics/Class Activity | Charles Slamar |
| 12:00 – 1:00 PM | Lunch | |
| 1:00 – 1:30 PM | Stewarding Planned Gifts | Damon Tinnon |
| 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 | Lorraine del Prado |
| 4:00 – 5:00 PM | Class Activity – Blended Gifts | |
| 5:00 – 6:30 pm | Closing Celebration Social Hour | |
| Evening | Dinner on your own | |

| Friday, July 22 | Topic | Faculty |
|---------------------|--|--------------|
| 7:30 – 8:30 AM | Breakfast – Great Hall, Memorial Union | |
| 8:00 – 8:30 AM | Open Class Time with Faculty | All Faculty |
| 8:30-9:30 AM | Tracking, Managing and Reporting Planned Gifts; Engaging your Board in Planning Giving | Karen Piel |
| 9:30 – 10:15 AM | Preparing Your Annual Activity Plan | Damon Tinnon |
| 10:15 – 10:30 AM | Refreshment Break | |
| 10:30 AM – 11:30 AM | “Open Mic” with Faculty | All Faculty |
| 11:30 – 12:00 PM | Presentation of Certificates and Farewells | All Faculty |