



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: - 2025 Madison Institute: Charitable Gift Planning
Names of Presenter(s): - Various
Dates and Location: - July 21-23, 2025 – Madison, WI

Date: Monday, July 21, 2025

Session 1: 8:00 am – 8:45 am (1.0 pts)

☐ - Introductions/Ice Breaker

Session 2: 8:45 am – 9:30 am (1.0 pts)

☐ - The Case for Charitable Gift Planning

Session 3: 9:45 am – 10:45 am (1.0 pts)

☐ - Tax Primer: Income, Estate Tax, and Estate Planning Primer

Session 4: 10:45 am – 12:00 pm (1.25 pts)

☐ - Charitable Deductions and Capital Gains Taxes

Session 5: 1:00 pm – 1:45 pm (1.0 pts)

☐ - Gifts of Assets and Taxes

Session 6: 1:45 pm – 2:45 pm (1.0 pts)

☐ - Planned Gift Instruments and Taxes

Date: Tuesday, July 22, 2025

Session 1: 8:45 am – 9:30 am (1.0 pts)

☐ - General Session: State of the Union

Session 2: 9:45 am – 10:30 am (1.0 pts)

☐ - Gift Planning Marketing

Session 3: 10:30 am – 11:15 am (1.0 pts)

☐ - GP Administration

Session 4: 11:15 am – 12:00 pm (1.0 pts)

☐ - Blended Gift Strategies

Session 5: 1:00 pm – 2:00 pm (1.0 pts)

☐ - Counting vs Accounting

Session 6: 2:00 pm – 2:45 pm (1.0 pts)

☐ - Case Studies

Session 7: 3:00 pm – 3:45 pm (1.0 pts)

☐ - Donor Stewardship and Recognition

Session 8: 3:45 pm – 5:00 pm (1.25 pts)

☐ - Role Playing and Shared Scenarios

Date: Wednesday, July 23, 2025

Session 1: 9:00 am – 10:15 am (1.25 pts)

☐ - Interviewing a GP Prospect and Prepare Gift Design

Session 2: 10:15 am – 11:45 am (1.5 pts)

☐ - Present Gift Plan and Ethics in Fundraising

Total number of points attained: _____/17.25

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/>