

**Association for Healthcare Philanthropy
Madison Institute**

Charitable Gift Planning

2025

Core Faculty:

Dave Smith, CAP®, Dean
Nicola Lawrence, CFRE, CAP®
Nelson Wittenmyer, J.D.

Monday, July 21	Topic/Activity	Faculty
7:00 – 8:00 AM	Breakfast Available	
8:00 AM – 8:45 AM	Introductions	All Faculty
	PRELUDE and FUNDAMENTAL PRINCIPLES for a PROGRAM	
8:45 – 9:30 AM	The Case for Charitable Gift Planning	Dave
9:30 – 9:45 AM	Break	
9:45 – 10:45 AM	Tax Primer: Income, Estate, and Gift Tax	Nelson
10:45 – Noon	Charitable Deductions and Capital Gains Taxes	Nelson
Noon – 1:00 PM	Luncheon	
1:00 – 1:45 PM	Gifts of Assets and Taxes	Nicola
1:45 – 2:45 PM	Planned Gift Instruments and Taxes	Nelson
	CREATING A PROGRAM	
2:45 – 3:00 PM	Break	
3:00 – 3:45 PM	How to Construct a Gift Planning Program	Nicola
3:45 – 4:30 PM	Gift Planning Prospect Segmentation	Dave
4:30 – 5:00 PM	Building a Donor Fact Pattern	Nicola
5:00 – 6:00 PM	Welcome Reception	
Evening	Dinner on your own	

Tuesday, July 22	Topic	Faculty
8:00 – 8:45 AM	Breakfast Available	
8:45 – 9:30 AM	General Session & Keynote Speaker	
9:45 – 10:30 AM	Gift Planning Marketing	Nicola
10:30 – 11:15 AM	GP Administration	Nelson
11:15 - Noon	Blended Gift Strategies	Nicola
Noon – 1:00 PM	Luncheon	
1:00 – 2:00 PM	Counting vs Accounting	Nelson
	IMPLEMENTING A PROGRAM	
2:00 – 2:45 PM	Case Studies	All Faculty
2:45 – 3:00 PM	Break	
3:00 – 3:45 PM	Donor Stewardship and Recognition	Nicola
3:45 – 5:00 PM	Role Playing and Shared Scenarios	All Faculty and Attendees
	Questions/Comments	All Faculty
5:00 – 6:00 pm	Networking Social	
Evening	Dinner on your own	

Wednesday, July 23	Topic	Faculty
8:00 – 9:00 AM	Breakfast & Optional Roundtables	
9:00 – 9:45 AM	Interviewing a GP Prospect	Nelson and Class
9:45 - 10:15 AM	Prepare Gift Design	Class
10:15 – 11:15 AM	Present Gift Plan	Nelson and Class
11:15 – 11:45 AM	Ethics in Fundraising	Dave
11:45 AM – 12:15 PM	Presentation of Certificates	Dave