

Association for Healthcare Philanthropy
Madison Institute

Charitable Gift Planning

2026

Core Faculty:

Dave Smith, CAP®, Track Dean
Nicola Lawrence, MCs, MSFP, PGC, CFRE, CAP®
Nelson Wittenmyer, J.D., LLM

Class Guest Speakers:

Michelle Glennon, Esq.

Madison Institute 2026—Charitable Gift Planning

Monday, July 13	Topic/Activity	Faculty
7:00 – 8:00 AM	Breakfast Available	
8:00 – 9:00 AM	General Session & Keynote Speaker	
9:00 AM – 9:30 AM	Class Introductions/Instructions	Dave
9:30 – 10:30 AM	The Case for Gift Planning	Dave
10:30 – 10:45 AM	Break	
10:45 – 12:00 PM	Tax Primer: Income, Capital Gains, Estate and Gift Tax	Nelson
12:00 PM – 1:00 PM	Lunch	
1:00 – 2:00 PM	The Gift Planning Conversation	Nicola
	Gift Planning Vehicles	
2:00 – 3:15 PM	Types of Gift Planning Assets	Nicola
3:15 – 3:30 PM	Break	
	Current Use Gifts	
3:30 – 4:30 PM	Gift Planning Instruments: Basics, Tax Benefits and Application of Appreciated Securities, and QCDs	Nelson
4:30 – 5:00 PM	Gift Planning Instruments: Basics, Tax Benefits and Application of Gifts of Real Estate and DAFs	Dave
5:00 – 6:00 PM	Welcome Reception	
Evening	Dinner on your own	

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

Madison Institute 2026—Charitable Gift Planning

Tuesday, July 14	Topic	Faculty
8:00 – 9:00 AM	Breakfast	
	Deferred Gifts	
9:00 – 10:00 AM	Charitable Gift Planning Instruments: Basics, Tax Benefits and Application of bequests, beneficiary designations, and life insurance	Nicola
10:00 – 11:00 AM	Life Income Gifts	Nelson
11:00 – 11:15 AM	Break	
11:15 – 12:15 PM	Case Studies	Dave
12:15 PM – 1:15 PM	Lunch	
	Prospect Identification	
1:15 – 2:15 PM	Gift Planning Prospect Identification	Nelson
2:15 – 3:15 PM	Gift Planning Marketing: Tools and Strategies	Nicola
3:15 – 3:30 PM	Break	
3:30 – 4:15 PM	Case Studies	Dave
	Qualification	
4:15 – 5:00 PM	Tools to Determine Donor Affinity, Financial Capacity, and Philanthropic Motivations	Nelson
5:00 – 6:00 pm	Networking Social	
Evening	Dinner on your own	

Madison Institute 2026—Charitable Gift Planning

Wednesday, July 15	Topic	Faculty
8:00 – 9:00 AM	Breakfast & Optional Roundtables	
9:00 – 10:00 AM	Gift Planning Prospect Segmentation	Dave
10:00 – 10:45 AM	Gift Planning in a Campaign	Nelson
10:45 – 11:00 AM	Break	
11:00 AM – 12:00 PM	Gift Planning and AI	Nicola
12:00 PM – 1:00PM	Lunch	
1:00 – 2:00PM	Blended Gift Strategies	Michelle
2:00 – 2:30 PM	What We've Learned So Far	Nicola
2:30 PM	Free afternoon begins	

Madison Institute 2026—Charitable Gift Planning

Thursday, July 16	Topic	Faculty
8:00 – 9:00 AM	Breakfast – Pyle Center	
9:00 – 10:00 AM	A Leading Practice: Building a Collaborative Team	Michelle
10:00 – 10:45 AM	Recognition and Stewardship	Nicola
10:45 – 11:00 AM	Break	
11:00 AM – 12:00 PM	What I Need to Know Before the Ask	Michelle
12:00 PM – 1:00 PM	Lunch	
1:00 PM – 1:45 PM	Interviewing a Gift Planning Prospect	Nelson
1:45 PM – 2:15PM	Gift Design	Class Project
2:15 – 2:30 PM	Break	
2:30 PM – 3:15PM	Interviewing a Gift Planning Prospect	Michelle
3:15 – 3:45 PM	Gift Design	Class Project
3:45 – 4:15PM	How to Construct Your Gift Planning Program/Next Steps	Dave
4:15 – 4:30 PM	What We've Learned/Put It Into Practice	Dave
4:30 – 5:00 PM	Presentation of Certificates	Dave
5:00 – 6:00 pm	Closing Celebration Social Hour	
Evening	Dinner on your own	