

Major and Planned Gifts

An Inseparable Duo for Fundraising Success
September 19 & 20 | Toledo Club

The Center
for nonprofit resources



Join us for an interactive workshop that will cover the fundamentals of major and planned gift work, ranging from program foundation, through strategy, to outcomes. Understand the essential support systems programs of all sizes need to have. Learn why and how to engage prospects for both types of gifts and the tips and tools needed to maximize the precious time of fundraisers, administrators, board members and more.

\$100 for both days or

- Day One | Major Gift Strategy \$60 | 8:30 AM - 3:00 PM
- Day Two | Planned Gift Strategy \$40 | 8:30 AM - 12:30 PM

Discounted prices for AFP members or graduates of The Center's Certificate Programs: Day One - \$50 and Day Two - \$30.

To register, visit c4npr.org.



Melanie Norton, MBA, CFRE
National Presenter
Norton Philanthropic Counsel

Our Featured Presenter - Melanie Norton

We are in the early years of the most significant transfer of wealth this nation will likely experience. That, coupled with economic uncertainty and increasing needs, makes this an excellent opportunity to rethink and recharge around your major and planned gift fundraising efforts.

During this workshop, you will:

- Understand the program basics and fundamentals of solid, holistic major and planned gift fundraising work and activities
- Learn about the support systems necessary for successful programs and work, including the policies, procedures and goals that ensure clear understanding among all parties
- Explore ethical issues including the considerations around emerging AI
- Realize program potential through effective engagement of board members, volunteers and other advocates
- Support the long-term success of fundraising programs through top-notch stewardship and donor engagement activities



Ken Frisch, ACFRE, FAFP
Retired
VP of Philanthropic Services
GTCF

You'll Hear from Two Local Fundraising Professionals on Day Two at 11:15 AM - Ken Frisch and Nick Kulik

For many fundraisers and nonprofits, the planned giving alphabet soup of IRA, QCD, CGA, CRAT, CRUT and CLT can become intimidating! You'll hear from our local fundraising professionals that the most important piece of planned giving is having a plan to effectively utilize resources to engage and educate donors. Whether you are a small or large organization, this presentation will provide a road map to help jump-start your planned giving program.



Nick Kulik, CFRE
Senior Director of Planned Giving
The University of Toledo Foundation