The University of Texas System
ADVANCEMENT ACADEMY

Advanced Gift Planning Training
Thursday, July 27, 2017
Austin, TX (UT System ASH 208)
10:00 AM – 4:00 PM

AGENDA

10:00 – 10:30 AM **TAX PRIMER**

- Income and Estate Tax concerns, including special topics such as Generation Skipping Tax and Marriage Portability

10:30 – 11:30 AM **GIFT PLANNING VEHICLES**

- Charitable Gift Annuities, Charitable Remainder Trusts, and Charitable Lead Trusts
  - Understanding the ins and outs, the donors who make the gifts, and the assets used to fund them
  - Marketing considerations for gift planning vehicles
  - Case Studies

11:30 AM – 12:15 PM **INCREASING TESTMENTARY COMMITMENTS**

- Maximizing resources to identify prospects
- How can prospects “self-identify”?
- The role of technology and analytics
- How can we do a better job of prospecting among current and retired faculty and staff?

12:15 – 1:30 PM **LUNCH AND PANEL DISCUSSION ON BLENDED GIFTS**

1:30 – 2:00 PM **ESTATE AND GIFT ADMINISTRATION**

- Documenting planned gifts, including when and what to count and who tracks new gifts
- The importance of gift agreements
- What happens when a planned gift is realized
- Gift Reporting: Navigating the VSE

2:00 – 2:15 PM **BREAK**

2:15 – 3:45 PM **GIFTS OF COMPLEX ASSETS**

- Determining legal ownership
- Asset types and the best prospects for them
- Transferring ownership
- Liquidating complex assets

3:45 – 4:00 PM **FINAL COMMENTS AND QUESTIONS**