# The Planned Giving Summit 2024

# PROGRAM AGENDA

**8:00 am**
**Welcome: Introductions and the Big Picture**

**8:30-9:30 am**
**Presentation One:** Opportunities to Capitalize - Trends, Wealth Transfer
(Takeaways: Recognize trends, cues, opportunities so gift discussions can be realized)

**9:45-10:45 am**
**Presentation Two:** The Planned Giving Conversation
Legacy discussion, Precall planning, natural partners, and handling objections

**11:00 am-12:00 pm**
**Presentation Three:** Utilizing Charitable Bequests and Other Simple Remainders
How the “Great Wealth Transfer” continues to accelerate the usage of charitable giving options like bequests and remainder beneficiary gifts

**12:00-1:00 pm: LUNCH**

**1:15-2:15 pm**
**Presentation Four:** Understanding the potential of Life - Recognize how and when CRTs, CGAs, and CLTs can be effective gifting options

**2:30-3:30 pm**
**Breakout: Case Studies** – Individual portfolio analysis with actual donor case studies
Prospect identification – Fit, Outcome and what gifting vehicles will work

**3:45-4:30 pm**
**Presentation Five**: Stories of success; Types of Conversations
**Breakout:** Individual Portfolio Analysis and Case Studies from Attendees
Prospect identification – Fit, Outcome and what gifting vehicles will work

**4:30 pm**
**Q & A and Closing Remarks**

Philanthropy miami | AFP Association of Fundraising Professionals Miami Chapter | Miami Dade College | Baptist Health | SHARPE GROUP

# PRESENTERS

**Joe Chickey, MBA, CFP®**
**Senior Consultant, SVP, Sharpe Group**

Joe brings more than 30 years of experience in the charitable arena, with a focus on gift planning to Sharpe Group. Based in Asheville, North Carolina he is a senior vice president and senior consultant. He earned a Bachelor of Arts degree in finance from Rhodes College and a master's degree in business administration from University of Illinois.

Joe has spoken locally, regionally, and nationally on planned giving to estate planning councils, AFP, CASE and local CGP groups. His recent speaking engagements include the Chicago Council on Planned Giving, Colorado Summer Symposium, Middle Tennessee Planned Giving Council and The Carolinas Planned Giving Conference. Joe recently completed a three-year term as a board member of the National Association of the Charitable Gift Planners (CGP).

Joe served as lead fundraiser for a $1.5 billion capital campaign at the University of Illinois and a $500 million capital campaign for a major hospital in Chicago. He has administered charitable remainder trusts, lead trusts, gift annuities, life estates & IRA gifts.

**Donald Hale**
**Senior Consultant, Sharpe Group**

Donald has worked with Sharpe Group since May 2022. He has served as a presenter with Joe Chickey at in-person planned giving seminars in Washington D.C., Nashville, TN, as well as multiple online programs. He worked with Joe on customized planned giving seminars for the University of Oklahoma Foundation in Norman, OK and Georgia State University in Atlanta, GA. Prior to joining the Sharpe Group team, he served on the philanthropy teams at three public universities: the University of Florida, the University of Central Florida, and the University of South Carolina; and two private schools: Rollins College and Embry-Riddle Aeronautical University.

Donald's interests include business intelligence, data analytics, KPIs of successful teams and programs, major gift and planned gift officer portfolio configuration, gift officer metrics, predictive modeling, and coaching officers who are new to planned giving.