

**April 14 – May 26, 2016**  
**Location: Greater Milwaukee Foundation**  
**101 W. Pleasant Street, Suite 210, Milwaukee WI 53212**

<b>MEETING DATES</b>	<b>TECHNICAL TOPICS</b>	<b>PROGRAMMATIC TOPICS</b>
Prequel April 14, 2016	Informal review of planned giving topics	This will be an informal session where we will go over some basic terms and concepts that will be used during the workshops. These include: trusts, wills, probate, estate, marital property, estate tax, and more.
I. April 21, 2016	Definition of a planned gift and gift planning. Overview of major planned giving vehicles.	Overview of what a Planned Giving Program is. Ethical considerations.
II. April 28, 2016	Fundamentals of income, gift, and estate taxes. Bequests. Life insurance.	What to do before your program goes public.
III. May 5, 2016	IRAs and qualified retirement plans. Charitable remainder trusts	Attracting donors: identifying prospects with potential
IV. May 12, 2016	Charitable gift annuities. Gift of a remainder interest in a house or farm.	Attracting donors: Marketing for planned gifts. Cultivating a planned giving prospect and asking for the gift.
V. May 19, 2016	Current gifts of real estate, closely held stock, life insurance, and other property.	Stewarding your planned giving donors.
VI. May 26, 2016	Gift planning exercises using hypothetical fact patterns.	