Planned Giving & Special Gifts: The Basics

This virtual course is for staff, whether newcomers or veterans, who work with or support development in nonprofits of any size.

Online | Monday, May 2, 2022 | 3 – 5 PM ET
CNPE Members $55 | Non-Members $110 | 2 CFRE Credits | Sign up

Planned giving lets donors (whatever their means) make transformational gifts through their estate plans. While this area of fundraising may take time, patience, and some expertise, it can yield significant long-term benefits and should be part of every nonprofit’s fundraising strategy.

What you will learn:

• The many types of planned gifts (and special non-cash gifts), including common terms and practices – as well as ethical considerations and best practices
• How to identify, engage, and educate prospective donors by listening for their intentions and needs
• How to market and explain planned gifts

Your expert instructors:

Kim Rutherford is Divisional Director of Planned Giving for The Salvation Army, overseeing planned gifts staff and programs in Kentucky and Tennessee. She held a similar senior role in planned giving for the Salvation Army in Virginia.

Angela Moderow is Regional Planned Giving Director for The Salvation Army and oversees planned gift activities in Tennessee. Angela has also served as Director of Marketing and Development for A Step Ahead Foundation and was Vice President of Marketing and Communications at YMCA of Memphis and the Mid-South.

Upcoming courses from our School for Fundraising:

- Storytelling – A Passion That Fuels Your Cause (4/19)
- Volunteer Leadership in Fundraising and Community Engagement (5/3)
- Forging Forward Together: How to Create a Fundraising Partnership with Your Chief Development Officer (5/25)