



Virtual Seminar

How to Draft and Implement Effective Gift Planning Policies and Procedures

Presented by: Philip M. Purcell, Vice President of Planned Giving and Endowment Resources, Ball State University Foundation, Muncie, IN

November 14, 2007 at 1:00 PM

12:30pm Registration & Brown Bag Lunch (refreshments will be provided)

1:00-2:30pm Program (**limited seating**)

Location McNamee Lochner Titus and Williams – 677 Broadway, Albany

Cost \$15 Members, \$25 Nonmembers

This may be the most important GPGNNY session of the year! Vitally important to the success of a major and planned gift program is proper accounting, valuation, and appropriate reporting.

If you report to a CEO, CFO, a development committee or Board, this virtual seminar will help you review, or prepare gift planning policies and procedures, the essential structure for gift acceptance, recording and reporting process most important and meaningful to the future of your work, your office, and help evolve better communications to leadership.

Any gift planner who works for and/or advise charities or donors as counsel need to be aware of the best practices associated with the education, cultivation, negotiation, completion, recognition and stewardship of planned gifts. Best practices assure compliance with legal and ethical standards to serve the interest of both donors and charities. Gift revenue may be increased for charities while tax and other benefits can be maximized for donors at reduced risk of legal or ethical violations.

This session will explore the most important elements in creating effective gift planning policies and procedures. It will share model policies for types of planned gifts, assets for gifts, documentation, privacy, crediting, valuing, recognition, stewardship, reporting, ethical standards and many other topics. Contains information covered in [Syllabus Sections: 4.01, 4.02.02](#). The live presentation of this seminar has been approved for 1.5 credit hours by the Certified Financial Planner Board of Standards, Inc.

To register and obtain additional program details please go to www.gpgnny.org

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