

Certified Specialist in Planned Giving^{CM}

A Professional Designation Program

The American Institute for Philanthropic Studies provides planned giving professionals and others who are involved in the planned giving process, with the knowledge and skills required to implement and maintain a successful gift planning program. The goal of the Institute is to set the standard for academic excellence, practical experience, and professional integrity in the field of Planned Giving.

The Certified Specialist in Planned Giving (CSPG) program is the training solution for those involved in field of planned giving. It is the only program of its kind and has been overwhelmingly successful since its debut in 1994.

Comprehensive Curriculum

- In-depth coverage and sophisticated treatment of pertinent topics and issues in the field of planned giving

About the CSPG Professional Designation

This is the only program that offers the Certified Specialist in Planned Giving (CSPG) designation.

This Designation Will:

- Document your proficiency as a planned giving professional
- Enhance your marketability
- Increase your opportunities for advancement in the field

How to Receive the CSPGCM Designation

- Complete all six modules
- Complete an examination for each module demonstrating an acceptable level of mastery of the curriculum
- Complete a practicum for faculty review in which you apply the knowledge and skills learned in the program to your current professional activity or career objective

Learn at Your Convenience

- You can take modules in sequence or separately as stand-alone courses
- Modules are offered every year beginning in September

Distinguished Faculty

Learn from professionals with widely acknowledged expertise and reputations

for excellence in the fields of planned giving, law, finance, education, and marketing.

Who Should Attend

- Planned giving officers, program directors, and administrators
- Directors of development
- Professional fund-raisers
- Attorneys and paralegals
- Accountants
- Financial planners
- Trust officers
- Board members
- Insurance and investment professionals

You Will learn

- How to evaluate individual situations and recommend the best planned giving techniques in concert with client's goals and objectives
- How charitable techniques can enhance basic and advanced estate planning
- How to minimize taxes and optimize income
- The Interplay of gift modeling and importance of investment management
- The role of gift planning in estate planning
- How to formulate and execute a marketing proposal
- How to select effective internal and external marketing vehicles
- How to administer international gift arrangements
- How to determine the cost-effectiveness of a planned giving program

- How to build a strong administrative team to deal effectively with a diverse range of organizational challenges

Professional Continuing Education Units

The CSPG program is approved for Continuing Education Units in the following areas: CFP, CFRE and MCLE.

What Your Colleagues are Saying about this Program:

"I have found the Certified Specialist in Planned Giving (CSPG) designation to be one of the most useful professional education programs in the fundraising and development space.

Whether you are a newbie fundraiser or mid-career, you will greatly benefit from the instruction and the invaluable reference materials produced by leading experts in the field."

- **Carli Jackson Lewis**, J.D., LL.M., Founder & Principal, California Philanthropic Consulting

"With the confidence gained by exposure to the broad spectrum of planned giving issues through my participation in the CSPG program, we've gone from a few thousand dollars in new planned gifts to literally millions in new gifts."

- **Lynn McDowell**, Planned Giving & Philanthropy Director, Alberta Conference of the Seventh Day Adventist

"I can't imagine that there is any other curriculum in deferred giving that could prepare a dedicated fund-raising professional for the future better than the CSPG program."

-**John Scibek**, Director of Gift and Estate Planning, The University of Texas at Austin

Accredited Estate Planner® Designation Program (AEP)



Interested in Obtaining the Accredited Estate Planner Designation?

Did you know the CSPG course is an approved gateway credential for the National Association of Estate Planners and Councils (NAEPC) Accredited Estate Planner (AEP) Designation Program. The CSPG designation is one of the 12 approved credentials an applicant must have to apply for the NAEPC AEP® designation.

Visit <https://www.naepc.org/> for more information.

Fall 2023-Spring 2024 Course Schedule

Modules One-Six

Module One

Financial Planning

Focus on data gathering methods to assist the client/donor in "discovering" their current financial position while establishing or clarifying their personal objectives going forward. To properly equip the student for this task, the course addresses:

- The personal balance sheet
- Cash flow requirements
- Common income tax strategies
- Legacy issues/estate planning basics
- accumulating wealth/investment basics
- Retirement planning-qualified plans-types and issues
- Building projections via present and future value calculations
- Questioning techniques
- Risk management
- Investment basics

Ultimately, the course focuses on interpreting the data gathered and the introduction of those charitable gift strategies which may compliment the client's overall objectives.

Instructors: James F. Normandin & Juan Ros

Dates: September 11 & 12, 2023
8:00 am - 5:00 pm (PST) via Zoom
Fee: \$975
Course Number-3401

Module Two

Tax Planning

Focus on the basic federal tax structure in the United States and on the basic concepts of the income tax system and the transfer tax system.

- **Income Tax System** - Basic overview including: tax policy, tax disputes, and judicial/regulatory interpretations, with emphasis on determining types of income and deductions, tax rates, alternative minimum taxes, and reading income tax returns
- **Gift and Estate Taxes** - Basic overview of the transfer tax system, including: tax policy related to transfer of wealth and review of legislative history
- **Methods of Transferring Wealth, Including Gift, Devise, Contract, and Law** - Gift and estate tax rules; generation-skipping transfer rules

Instructors: Craig Wruck

Marketing Planned Giving

Developing the marketing plan, attracting donor prospect attention and relationship building techniques will be covered.

- **Marketing Strategies** - Newsletters, postcards, institutional publications, general and targeted mail brochures, fact sheets, seminars, professional networks, and web-based marketing
- **Solicitation Procedures and Techniques**
- **Special Concerns**
- **Elements of a Proposal** - The case for supporting the charity, the purpose of the gift, the amount requested, method of making the gift, tax, financial, and intangible donor benefits
- **Features of a Proposal Assumptions** - Summary of gift arrangement, tax consequences, and cash flow projections, use of graphics, win-wins for donor and agency

Instructor: Cathy R. Sheffield

Dates: November 13 & 14, 2023
8:00 am - 5:00 pm (PST) via Zoom
Fee: \$975
Course Number-3402

Module Three

Estate Planning - Part I and II

Focus on the different aspects of Estate Planning.

- **Traditional Estate Planning Tools** – Wills, living trusts, irrevocable trusts, intra-family gifting, probate, and life Insurance
- **Estate and Gift Taxes** - Basic estate and gift tax rules exclusions
- **Business Succession Planning** - Goals, strategies, and their application to charitable planning
- **Estate Planning Strategies** - Gifts, family sales, grantor retained income trusts, residential trusts, and family partnerships
- **Application to Charitable Planning Goals** - Philanthropic heritage, wealth preservation, and liquidity planning
- **Application to Charitable Planning Strategies** - Deferred gifting techniques and family foundations
- **Private Charitable Entities** - Use of Private Foundations, Donor Advised Funds and Supporting Organizations to meet donor goals
- **Risk Management** - Discussion of causes of litigation regarding planned gifts and effective litigation and estate management

Instructor: Jerad Beltz and Reynolds T. Cafferata

Dates: January 22 & 23, 2024
8:00 am - 5:00 pm (PST) via Zoom
Fee: \$975
Course Number-3403

Module Four

Charitable Gifting Part One: Assets and Entities

Focus on foundations: private, public, supporting, and community; general tax rules, restrictions and limitations.

Charitable Gift Assets - Types of classes, risks and benefits of each, and evaluation of assets and procedures for conveying title, ownership, and possession

Instructors: Stephanie Buckley & Elizabeth Bawden

Charitable Gifting Part Two: Other Deferred Gifting Techniques

Focus on design issues, valuation concerns, administration/operation, and obtaining tax deduction and benefits of both outright and deferred methods.

- **Outright Methods** - Bargain sales, conservation easement, services, and in-kind retirement assets
- **Deferred Methods** - Wills, charitable trusts, charitable gift annuities, life insurance, pooled income funds, and remainder interest in residence or farm
- **Design Issues**
- **Valuation Concerns**
- **Administration and Operation**
- **Charitable Gift Substantiation for Tax Benefits**

Ultimately, the course focuses on interpreting the data gathered and the introduction of those charitable gift strategies which may compliment the client's overall objectives.

Instructors: Claudia B. Sangster & Steven Chidester

Dates: March 18 & 19, 2024
8:00 am - 5:00 pm (PST) via Zoom
Fee: \$975
Course Number-3404

Class location: Classes will be held via Zoom

What is included? Instruction materials will be provided in an electronic version prior to each module.

In addition to the live class, all registrants will receive a link to the audiovisual recording of each session that will be active for 60 days of unlimited views.

Module Five

Charitable Gifting Methods: Charitable Remainder Trust

A complete overview of the income, gift, and estate tax consequences associated with Charitable Remainder Trusts will be presented.

- Present value computation
- Cash flow analysis
- Suitable gift assets
- Administration and other operational considerations and application of CRT planning strategies to individual and corporate planning objectives

Instructor: Lynda L. Sands

Dates: May 13 & 14, 2024
8:00 am - 5:00 pm (PST) Via Zoom
Fee: \$975
Course Number-3405

Module Six

Administration and Operation of Planned Giving Programs

Focus on the administration and operational side of planned giving programs.

Practical Issues - Forms, procedures, processes for the intake and on-going operations of Planned Gifts

- **Developing Written Guidelines** - Application of guidelines to the offices of development, business, and public relations
- **Operational Issues** - Review of types of Planned Gifts, 4-tier accounting requirements, appropriate type, and payout percentages in today's environment
- **Responsibilities and Roles of Administration** - Development office, business/financial office, in-house/outside counsel, operational board/foundation board, and volunteers
- **Procedures** - Conveyance of gift deeds, reports to donor and beneficiaries, asset management, appraisal fees and expenses, duties to disclose possible errors, oversight, and poor performance to income beneficiaries and remainder beneficiaries
- **Investment Issues** - Role of Behavioral Finance and Trust % in managing charitable trusts
- **Use of Professionals in Gift Administration** - Auditors and accountants, periodic legal review, and contracting with outside professionals

Instructor: Phillip M. Purcell

Elder Care

The focus is on understanding the financial, emotional, and physical needs of the

elderly and the relationship between those needs and the professional involved in planned giving.

- Through the use of statistical analysis, demographics, trends and case studies, this module equips the professional to better serve the elderly community.
- Health care affecting the elderly's financial and physical needs
- Powers of attorney, health care directives, conservatorships, incapacity and estate planning
- Ethics and charitable planning
- Residential needs and long-term care
- Preservation of the integrity of charitable gifts

Instructor: John Lansing

International Gift Planning

Focus on the International Gift Planning process.

- **International Gift Planning** - Grants by U.S. charities for use abroad, rules governing international grant making by U.S. public charities and private foundations
- **Gift Planning for U.S. Citizens** - Gift arrangements for gifts by U.S. citizens to non-U.S. public charities and how to maximize the tax benefits
- **Aliens** - Structuring gifts from non-resident aliens to U.S. charities
- **Special Tax Considerations for Residential and Non-residential Aliens** - Income tax, estate, and gift tax rules
- **Special Treaty Variations** - Canada, Mexico, and Israel

Instructor: Cynthia D. Brittain

Dates: July 22 & 23, 2024
8:00 am - 5:00 pm (PST) via Zoom
Fee: \$975
Course Number-3406

Practicum

The written practicum should demonstrate a knowledge and comprehensive application of the principles and practices set forth within the selected area of study. This final project is due following the completion of Modules 1-6 and will be evaluated by the Practicum Faculty Advisor.

Practicum Review Fee: \$350
Course Number – 3407
Payment Options:

1. **Pay in Advance Discount**
 - \$5,700 if you register and pay in advance
2. **Pay per individual module**
 - Module 1-6 \$975 each
 - Practicum Review Fee \$350

Faculty

These nationally known experts will put decades of experience at your fingertips. No other program offers the same breadth and depth of hands-on planned giving experience.

Jerad Beltz

J.D., Freeman, Freeman, and Smiley

Elizabeth Bawden

J.D., Partner, Withers Bergman

Cynthia D. Brittain

J.D., LL.M., Karlin & Peebles

Stephanie Buckley

J.D., LL.M., Vice President/Philanthropic Specialist/SWS
Senior Advisory Specialist, Wells Fargo Private Bank,
Philanthropic

Reynolds T. Cafferata

J.D., Rodriquez, Horii, Choi, and Cafferata

John Lansing

Esq., Elder Law Attorney

Michael Losquadro

CSPG, Practicum Faculty Advisor, American Institute for
Philanthropic Studies, Former Senior Advisor- Campus
Advancement, University Relations and Advancement,
California State University, Office of the Chancellor

James F. Normandin *

Consultant, Charitable Gift Planning, Normandin and
Associates

Phillip M. Purcell

CFRE, MPA/J.D., Consultant for Philanthropy
Adjunct Faculty, Indiana University Maurer School of Law
and Lilly School of Philanthropy

Juan Ros

CFP, CSPG, AEP, CEPA, CVGA, Financial Advisor, Forum
Financial Management

Lynda L. Sands *

J.D., MBA, Asset Sentry

Claudia B. Sangster

J.D., Former Sr. Vice President, Director of Family
Education, Governance, Wealth Planning, Advisory
Services, Northern Trust

Steven Chidester

Esq., Partner, Wealth Planning and Tax, Withers
Bergman

Cathy R. Sheffield

CAP, CSPG, CFRE, FCEP

Chief Advancement Officer, Lena Pope & President,
ThinkGiving

Craig Wruck

Consultant, Charitable Gift Planning, FTE Services

* Founding Faculty