CSPG Certified Specialist in Planned Giving — American Institute for Philanthropic Studies

# Certified Specialist in Planned Giving Program

## American Institute for Philanthropic Studies

*Helping Professionals Shape the Future of Philanthropy since- 1994*

## About the CSPG Designation

The Certified Specialist in Planned Giving (CSPG) Program at the American Institute for Philanthropic Studies is the premier training solution for professionals involved in the gift planning process.

This comprehensive program provides in-depth knowledge of charitable gift planning, estate planning strategies, tax implications, and donor engagement techniques—ensuring that participants are prepared to navigate the complexities of planned giving with confidence and success.

Designed to equip fundraisers, financial advisors, attorneys, and nonprofit leaders with the expertise to create and manage effective gift planning strategies, CSPG sets the benchmark for academic excellence, real-world application, and professional integrity.

## Who Should Attend?

The Certified Specialist in Planned Giving Program (CSPG) is designed for professionals eager to expand their expertise in planned giving and make an impact in their organizations. This program is ideal for:

1. **Planned Giving Officers & Program Directors**
2. **Development & Fundraising Professionals**
3. **Attorneys & Paralegals**
4. **Accountants & Financial Planners**
5. **Trust Officers & Board Members**
6. **Insurance & Investment Professionals**

# Why Choose the CSPG Program?

Earning the Certified Specialist in Planned Giving (CSPG) designation equips you with the expertise, credibility, and connections to excel in the field of planned giving. Here's how this program benefits you:

### Structured Learning

- Flexible learning options allow you to complete modules in sequence or as standalone courses on their scheduled dates.
- Virtual, instructor-led classes provide an interactive and engaging learning experience.
- Access recorded sessions for review, ensuring you can revisit key content as needed.

### Expert Guidance

- Learn directly from top professionals in philanthropy, finance, law, and fundraising.
- Gain real-world insights from faculty with extensive hands-on experience in planned giving.
- Receive personalized support and feedback to ensure mastery of complex topics.

### Boost Your Career

- Stand out with a nationally recognized CSPG designation that enhances your credibility.
- Increase your career opportunities in nonprofit development, estate planning, and financial advising.
- Develop specialized skills that demonstrate your expertise in tax-efficient charitable giving strategies.

### Powerful Networking

- Join a distinguished community of CSPG alumni, faculty, and philanthropic professionals.
- Connect with peers and mentors who can provide career guidance and collaboration opportunities.
- Gain access to exclusive networking events and continued professional development resources.

# How To Register

### Online

Register online with your VISA, MasterCard or American Express.

### Email

Complete the registration form (except for credit card information) and e-mail to:

- b.pruitt@csulb.edu
- Call 562.985.8466 to provide credit card information.

### Mail

Complete the registration form and mail it with your payment to:

- American Institute for Philanthropic Studies
California State University Long Beach, Research Foundation
6300 State University Dr. Suite 332
Long Beach, CA 90815

### Phone

Register with your VISA, MasterCard or American Express by calling 562.985.8466.

# 2025/2026 Course Schedule

## Module 1: Financial Planning

Utilize effective data gathering techniques to help clients or donors gain a clear understanding of their current financial position while establishing or clarifying their personal objectives.

**Key Topics:**

- Personal balance sheets & cash flow analysis
- Income tax strategies, legacy issues & estate planning fundamentals
- Wealth accumulation & investment fundamentals
- Retirement planning – qualified plans – types & issues
- Present & future value calculations
- Questioning techniques for client discovery
- Risk management & investment basics

**Instructors: James F. Normandin & Juan Ros** **Fee: $995 | September 8-9, 2025 | 8:00 AM - 5:00 PM (PST)**

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## Module 2:

### Part One: 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.

**Key Topics:**

- Income Tax System – Overview of tax policy, tax disputes, deductions, & judicial / regulatory interpretations, with an emphasis on determining types of income & deductions, tax rates, alternative minimum taxes, & reading income tax returns
- Gift & Estate Taxes – Explore wealth transfer tax system & tax policy related to transfer of wealth
- Wealth Transfer Methods – Learn rules for gifting, estate planning, & generation-skipping transfers

### Part Two: Marketing Planned Giving

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

**Key Topics:**

- Marketing Strategies – Engage donors using newsletters, mailers, web content, social media campaigns & events
- Solicitation Techniques – Build relationships & craft compelling solicitations
- Proposal Elements – The case for supporting the charity, the purpose & method of making the gift & intangible donor benefits

**Instructor: Cathy Sheffield & Kyle Wesely** **Fee: $995 | November 3-4, 2025 | 8:00 AM - 5:00 PM (PST)**

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## Module 3 : Estate Planning

Focus on the different aspects of estate planning.

**Key Topics:**

- Traditional Estate Planning Tools – Wills, living trusts, irrevocable trusts, probate & life insurance
- Estate & Gift Taxes - Basic estate & gift tax rules exclusions
- Business Succession Planning – Goals, strategies, & their application to charitable planning
- Estate Planning Strategies – Gifts, family sales, grantor retained income trusts, residential trusts & family partnerships
- Charitable Planning Goals & Strategies – Use of private charitable entities & risk management

**Instructors: Jerad Beltz & Reynolds T. Cafferata** **Fee: $995 | January 12-13, 2026 | 8:00 AM - 5:00 PM (PST)**

## Payment Options

- **Pay in Advance Discount:** $5,800 for all 6 modules when paid upfront, including the practicum review fee.
- **Individual Module Pricing:** $995 per module, plus a $350 practicum review fee.
- **Group Pricing:** $5,700 for all 6 modules when you enroll 2 or more individuals from the same organization and pay upfront. Includes the practicum review fee.

# 2025/2026 Course Schedule

## Module 4 : Charitable Gifting

### Part One: Assets & Entities

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

**Key Topics:**

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

### 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.

**Key Topics:**

- Outright Methods – Bargain sales, services, & in-kind retirement assets
- Deferred Methods – Wills, charitable trusts, gift annuities, life insurance, pooled income funds, & real estate remainder trusts
- Design Issues, valuation concerns & charitable gift substantiation for tax benefits

**Instructors: Elizabeth Bawden, Claudia B. Sangster**
**Stephanie Buckley, & Steven Chidester** **Fee: $995 | March 16-17, 2026 | 8:00 AM - 5:00 PM (PST)**

## Module 5 : Charitable Remainder Trusts

Overview of the income, gift, and estate tax consequences associated with Charitable Remainder Trusts.

**Key Topics:**

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

**Instructor: Kevin Brown & Lynda L. Sands** **Fee: $995 | May 11-12, 2026 | 8:00 AM - 5:00 PM (PST)**

## Module 6 : Administration & Operation of Planned Giving Programs, Elder Care & International Gift Planning

Focus on the Administration and Operational side of planned giving programs, Elder Care and International Gift Planning.

**Part One Key Topics:**

- Developing Written Guidelines
- Operational Issues
- Responsibilities & Roles of Administration
- Procedures
- Investment Issues
- Use of Professionals in Gift Administration

**Part Two Key Topics:**

- Use of statistical analysis, demographics, trends & case studies
- Residential needs & long-term care of the elderly
- Powers of attorney, health care directives, conservatorships, & estate planning
- Preservation of the integrity of charitable gifts

**Part Three Key Topics:**

- U.S. charity grants & rules for international giving
- Gift planning for U.S. citizens donating to non-U.S. charities & tax benefits
- Structuring gifts from non-resident aliens to U.S. charities
- Tax considerations for residential & non-residential aliens (income, estate, & gift tax rules)
- Special treaty variations

**Instructors: Cynthia D. Brittain, John Lansing & Philip M. Purcell** **Fee: $995 | July 13-14, 2026 | 8:00 AM - 5:00 PM (PST)**

## Practicum

**What is the 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 Fee : $350**

# How to Receive the CSPG Designation

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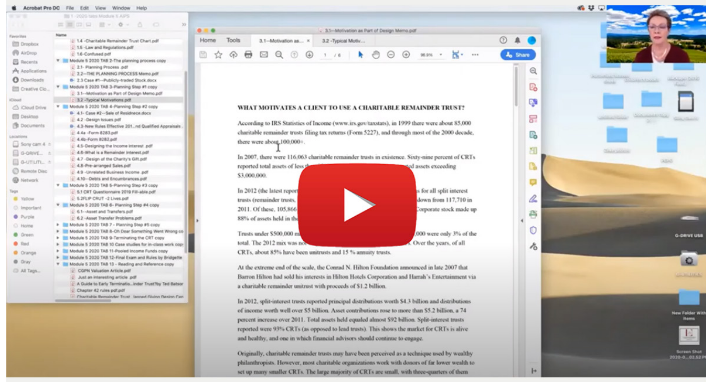
| **1. Enroll and Choose Your Starting Module** | Register online and select your preferred starting point, with all modules required to complete the program. |
| **2. Attend Live Zoom Sessions** | Join expert-led classes, held on specific dates from September through July. |
| **3. Pass Each Module Exam** | Demonstrate satisfactory mastery of the curriculum. |
| **4. Complete Your Practicum** | Apply your skills in a real-world project for faculty review. |
| **5. Receive Your CSPG Certification** | Become officially certified and advanced in your career as a Certified Specialist in Planned Giving. |

**Online Course Preview**

All modules in the 2025/2026 academic year will be held virtually via zoom.

**Online Course Preview**




Elizabeth Bawden


Jerad Beltz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Stephanie Buckley


Reynolds T. Cafferata


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John Lansing


Michael Losquadro


James F. Normandin


Philip M. Purcell


Juan Ros


Lynda L. Sands


Claudia B. Sangster


Cathy R. Sheffield


Kyle Wesely

# Faculty & Testimonials

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.

*"Earning the CSPG designation was a transformative experience in my career. The program provided a comprehensive foundation in the technical aspects of planned giving, equipping me with the knowledge and tools to structure meaningful, tax-efficient gifts that benefit both donors and the organizations they support..."*
**- Aaron Levinson**
**Los Angeles Jewish Health**

*"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,**
**Alberta Conference of the Seventh Day Adventist**

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

*"CSPG is the top certification in planned giving with some of the best faculty in our field. The program changed my life and led to my serving a few of the best medical institutions in the world. 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, University of Texas at Austin**

*"Obtaining my Certified Specialist in Planned Giving credential was one of the most rewarding experiences. The presenters were top-notch, and the information I learned was incredibly helpful in giving me the confidence and expertise to support donors with complex gift vehicles and charitable estate planning."*
**- Karen Senger,**
**Food Bank of Northern Nevada**

*"Achieving the CSPG certification from the American Institute for Philanthropic Studies has been a transformative experience. It has equipped me with the knowledge and expertise to guide donors in making their philanthropic dreams come true by seamlessly integrating charitable contributions into their financial and estate planning."*
**- Brie Smith, IECF**

**Elizabeth Bawden**
J.D., Partner, Withersworldwide
**Jerad Beltz**
J.D., Sr. Vice President, Deputy Counsel, Whittier Trust
**Cynthia D. Brittain**
J.D., Partner, LL.M., Holland & Knight
**Kevin Brown**
CSPG, FCEP, Associate Vice President of Estate, Trust & Gift Planning Montana State Alumni Foundation
**Stephanie Buckley**
J.D., LL.M., Managing Director, Philanthropic Services, Wells Fargo
**Reynolds T. Cafferata**
J.D., Partner, Rodriguez, Horii, Choi & Cafferata
**Steven Chidester**
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**John Lansing**
Esq., Elder Law Attorney Hahn & Hahn, LLP
**Michael Losquadro**
CSPG, Practicum Faculty Advisor, American Institute for Philanthropic Studies, Sr. Advisor (Retired), Campus Advancement, University Relations & Advancement, California State University, Office of the Chancellor
**James F. Normandin***
Consultant, Normandin & Associates
**Philip M. Purcell**
CFRE, MPA/J.D., Director of Planned Giving, Salvation Army-Central Territory
**Juan Ros**
CFP, CSPG, AEP, CEPA, CVGA, Partner, Forum Financial Management
**Lynda L. Sands***
J.D., MBA, Asset Sentry
**Claudia B. Sangster**
J.D., President & Founder, C. Sangster, LLC
**Cathy R. Sheffield**
CAP, CSPG, CFRE, FCEP, Sr. Director of Gift Planning, Belmont University, Founder, ThinkGiving
**Kyle Wesely**
CPA, Managing Shareholder, Wesely & Wesely, CPAs, LTD