CFRE International
Certifying fundraising executives
Setting standards in philanthropy

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CONTINUING EDUCATION POINTS TRACKER

CFRE International has developed this form as a way for you to quickly track (and keep in your files!) the continuing education sessions you have attended. Simply check the boxes next to the sessions you attended. At the end of the conference, add up the total number of hours. Keep this sheet and you will be ready to complete your application form. All of the session slots listed are eligible for continuing education points on your CFRE application for initial certification and/or recertification. Sessions not listed here are not eligible for points.

Activity Organizer: - **Partnership for Philanthropic Planning**
Title of Activity: - **2014 National Conference on Philanthropic Planning**
Dates and Location: - **10/14/14 – 10/16/14, Anaheim, California**

Date: 14 October, 2014

☐ - JUMPSTART: Gift Planning Fundamentals, 1 pm – 5 pm, (4 pts.)
☐ - Leadership Institute Roundtable, 3 pm – 5 pm, (2 pts)
☐ - Opening Dinner/Keynote, 6:30 pm – 8:30 pm, (1 pts.)

Date: 15 October, 2014

Session 1: 8:30 am – 9:30 am (1.0 pts)

☐ - Bad Mistakes and How to Avoid Them
☐ - How to Be a Silo-Breaker
☐ - How to Do the Most Important Thing Right
☐ - How to Collaborate Effectively Across our Professional Cultures
☐ - How to Build Gift Planning Culture From the Top Down, or the Bottom Up
☐ - Anticipating and Responding to Changes in Gift and Estate Planning

Date: 15 October, 2014

Session 2: 10:00 am – 11:00 am (1.0 pts)

☐ - Are You Prepared for the Recovery in Real Estate Gifts?
☐ - "I Don't Know Anything About You . . ." Introducing Gift Planning in Conversations
☐ - Building and Maintaining the Testamentary Gifts Pipeline
☐ - Why Charitable Beneficiaries Should Monitor Estates to Avoid Income and Estate Tax
☐ - What Your Boss Really Needs to Know About Gift Planning
☐ - The Rebirth of the Charitable Remainder Trust

Date: 15 October, 2014

Session 3: 11:30 am – 12:30 am (1.0 pts)

☐ - Lessons Learned – Best Practices of the Best Planners
☐ - Charitable Remainder Unitrusts and Annuity Trusts: The Fundamentals and Beyond
☐ - "Plannual Giving"—A New Framework for Marketing Planned Gifts
☐ - The “Obamacare Tax”: Understanding Its Impact on CRTs and Donors
☐ - Estate Taxes: Is The Glass Half Empty or Half Full?
☐ - Why Pooled Income Funds Deserve a New Look

Date: 15 October, 2014

Session 4: 11:30 am – 1:00 pm (1.5 pts)

☐ - Leadership Institute Roundtable

Date: 15 October, 2014

Session 5: 2:00 pm – 3:00 pm (1.0 pts)

☐ - Advanced Charitable Remainder Trust Design
☐ - Incorporating a Women's Initiative— How We Started and What We Learned
☐ - Volunteers: The Boon and Bane of Fundraising
☐ - The Philanthropic Conversation: Understanding Advisor Approaches and Client Expectations
☐ - Legislative & Regulatory Update: News from IRS, Congress and the Court
☐ - Increasing and Preserving Revocable Gifts

Date: 15 October, 2014

Session 6: 3:30 pm – 5:00 pm (1.5 pts)

☐ - CLUT-tered: My First Charitable Lead Trust—A Case Study

☐ - 3 Horse Race: Harnessing Blended Gifts, Bequest Intention Forms & Collaboration

☐ - Why me? Why here? Why now? Creating Your Public Narrative

☐ - Meet the Hurleys! An Interactive Multi-Generational Case Study

☐ - The Power of Engagement: Amplify Your Donor Communication Strategy

☐ - Broadening the Appeal of Gift Annuities

Date: 15 October, 2014

Session 7: 5:15 pm – 7 pm (1.0 pts)

☐ - Stalemate-Shaking the Tree

Date: 16 October, 2014

Session 1: 8:30 am – 9:30 am (1.0 pts)

☐ - IGNITE!

Date: 16 October, 2014

Session 2: 10:00 am – 11:00 am (1.0 pts)

☐ - Business Succession Planning: Adding Philanthropy to the Mix

☐ - The ABCs of Major and Planned Gift Portfolio Management

☐ - It's All About CONVERSING with Donors

☐ - How to Avoid the 2014 Top Charitable Estate Planning Mistakes

☐ - Building Lasting Legacies: An In-Depth Look of Legacy Society Members

☐ - Gift Planning for Same-Sex Couples

Date: 16 October, 2014

Session 3: 11:30 am – 12:30 pm (1.0 pts)

☐ - Playing Detective to Protect a Donor's Charitable Bequest

☐ - The Art (and Science) of Persuasion

☐ - Metrics that Count—A Scalable Approach to Setting Goals and Evaluating Results

☐ - Drafting for Eternity: Legal Lessons and Practical Advice for Charities, Their Donors, and the Professionals Who Advise Them

☐ - Forgotten But Not Gone: The Philanthropy Protection Act of 1995

☐ - Gifts Involving Partnerships, LLCs and S-Corps

Date: 16 October, 2014

Closing Luncheon (1.0 pts)

☐ - Golden Nuggets from Ivory Towers: Recent Powerful Research Impacting Gift Planning

Total number of points attained: ___________