



## 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:** - Association for Healthcare Philanthropy  
**Title of Activity:** - 2023 Madison Institute: Planned Giving  
**Names of Presenter(s):** - Various  
**Dates and Location:** - July 16-21, 2023 – Madison, WI

### **Date: July 16, 2023**

#### **Session 1: 5:00 pm – 6:30 pm (1.5 pts)**

- Making the Most of the Madison Experience

### **Date: July 17, 2023**

#### **Session 1: 8:00 am – 9:00 am (1.0 pts)**

- General Session: State of the Union of Healthcare Philanthropy

#### **Session 2: 9:00 am – 10:00 am (1.0 pts)**

- The Promise of Planned Giving and Factors Motivating Planned Gifts

#### **Session 3: 10:45 am – 12:00 pm (1.25 pts)**

- The Charitable Gift Toolbox

#### **Session 4: 1:00 pm – 2:30 pm (1.5 pts)**

- Engaging Diverse Constituencies in Legacy Planning

#### **Session 5: 3:15 pm – 4:15 pm (1.0 pts)**

- Taxes and Planned Giving

#### **Session 6: 4:15 pm – 5:00 pm (0.75 pts)**

- Gifts from IRAs/Retirement Plans

### **Date: July 18, 2023**

#### **Session 1: 7:30 am – 8:30 am (1.0 pts)**

- General Session: Inclusive Philanthropy

#### **Session 2: 9:30 am – 10:30 am (1.0 pts)**

- Gifts Donors Can Change: Wills, Trusts and Beneficiary Designations

#### **Session 3: 10:45 am – 12:15 pm (1.5 pts)**

- Gifts Donors Cannot Change: Life Income Gifts

#### **Session 4: 1:15 pm – 2:00 pm (0.75 pts)**

- Gifts Donors Cannot Change: Lead Trusts, Bargain Sales and Retained Life Estates

#### **Session 5: 2:00 pm – 2:45 pm (0.75 pts)**

- Class Activity

#### **Session 6: 3:00 pm – 4:00 pm (1.0 pts)**

- Receiving Planned Gifts: Estate Administration 101

#### **Session 7: 4:00 pm – 5:00 pm (1.0 pts)**

- Gifts from Donor Advised Funds; Gifts of Life Insurance; and other Miscellaneous Gift Types

Courses Marked **NFR** (Non Fundraising Related) may be counted towards the 10 point maximum of NFR Courses on the initial CFRE application and the 5 point maximum on the re-certification application.

Find more **CFRE approved** continuing education opportunities on **My Education Finder**:  
<http://www.cfre.org/continuing-education/my-education-finder/>

**Date: July 19, 2023**

**Session 1: 7:30 am – 8:30 am (1.0 pts)**

- General Session: Privacy

**Session 2: 8:45 am – 9:45 am (1.0 pts)**

- Planned Giving Marketing Tools

**Session 3: 10:00 am – 11:00 am (1.0 pts)**

- Developing a Planned Giving Marketing Plan

**Session 4: 11:30 am – 12:30 pm (1.0 pts)**

- Open Mic: Session 1

**Date: July 20, 2023**

**Session 1: 9:00 am – 10:30 am (1.5 pts)**

- Cultivating and Soliciting Planned Gifts

**Session 2: 10:45 am – 12:00 pm (1.25 pts)**

- Ethics/Class Activity

**Session 3: 1:30 pm – 2:15 pm (0.75 pts)**

- Working with Professional Advisors

**Session 4: 2:30 pm – 4:00 pm (1.5 pts)**

- Integrating Family and Charitable Legacies in Estate Plans

**Session 5: 4:00 pm – 5:00 pm (1.0 pts)**

- Class Activity – Blended Gifts

**Date: July 21, 2023**

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

- Tracking, Managing and Reporting Planned Gifts; Engaging Your Board in Planned Giving

**Session 2: 9:30 am – 10:15 am (0.75 pts)**

- Preparing Your Annual Activity Plan

**Session 3: 10:30 am – 11:30 am (1.0 pts)**

- Open Mic: Session 2

**Total number of points attained: \_\_\_\_\_**

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