



CERTIFIED FUND RAISING EXECUTIVE

Approved Provider for
Continuing Education 

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: - Madison Institute 2022: Track 6 – Planned Giving
Names of Presenter(s): - Various
Dates and Location: - July 17-22, 2022 – Madison, WI USA

Date: July 18, 2022

Session 1: 9:15am – 10:00am (1 pt)

- The Promise of Planned Giving and Factors
Motivating Planned Gifts

Date: July 18, 2022

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

- The Charitable Gifts Toolbox

Date: July 18, 2022

Session 3: 1:00 – 2:30pm (1.5 pts)

- Engaging Diverse Constituencies in Legacy
Planning

Date: July 18, 2022

Session 4: 3:15pm – 4:15pm (1 pt)

- Taxes and Planned Giving

Date: July 18, 2022

Session 5: 4:15pm – 5:00pm (1.25 pts)

- Gifts from IRA's / Retirement Plans

Date: July 19, 2022

Session 1: 9:15am – 10:00am (1 pt)

- Gifts Donor Can Change: Will, Trusts, and
Beneficiary Designations

Date: July 19, 2022

Session 2: 10:45am – 12:15pm (1.5 pts)

- Gifts Donor Cannot Change: Life
Income Gifts

Date: July 19, 2022

Session 3: 1:15pm – 2:00pm (1 pt)

- Gifts Donor Can Change: Lead Trusts,
Bargain Sales, Retained Life Estates

Date: July 19, 2022

Session 4: 2:00pm – 2:45pm (1 pt)

- Class Activity

Date: July 19, 2022

Session 5: 3:00pm – 4:00pm (1 pt)

- Receiving Planned Gifts: Estate
Administration 101

Date: July 19, 2022

Session 6: 4:00pm – 5:00pm (1 pt)

- Gifts from Donor Advised Funds

Date: July 20, 2022

**Session 1: 9:30am – 10:15am, 10:30am –
12:00pm (2.25 pts)**

- Planned Gift Marketing Tools

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 20, 2022

Session 2: 12:00pm – 1:00pm (1.5 pt)

- Developing a PG Marketing Plan

Date: July 21, 2022

Session 1: 9:00am – 10:30am (1.5 pts)

- Cultivating and Soliciting Planned Gifts

Date: July 21, 2022

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

- Ethics

Date: July 21, 2022

Session 3: 1:30pm – 2:15pm (1 pt)

- Working with Professional Advisors

Date: July 21, 2022

Session 4: 2:30pm – 4:00pm (1.5 pts)

- Integrating Family and Charitable Legacies in Estate Plans

Date: July 21, 2022

Session 5: 4:00pm – 5:00pm (1 pt)

- Blended Gifts

Date: July 22, 2022

Session 1: 8:30am – 9:30am (1 pt)

- Tracking, Managing, and Reporting Planned Gifts

Date: July 22, 2022

Session 2: 9:30am – 10:15am (1.5 pts)

- Preparing Your Annual Activity Plan

Total number of points attained: _____

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