



## 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:** - 2024 Madison Institute: Charitable Gift Planning  
**Names of Presenter(s):** - Various  
**Dates and Location:** - July 21-25, 2024 – Madison, WI

**Date: July 21, 2024**

**Session 1: 1:00 pm – 1:45 pm (0.75 pts)**

- Introductions/Ice Breaker

**Session 2: 1:45 pm – 2:30 pm (0.75 pts)**

- The Case for Charitable Gift Planning

**Session 3: 2:45 pm – 3:45 pm (1.0 pts)**

- Income, Estate Tax, and Estate Planning Primer

**Session 4: 3:45 pm – 5:15 pm (1.5 pts)**

- Gift Planning Instruments

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

- Charitable Gift Planning Assets

**Date: July 22, 2024**

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

- General Session: Science & Ethics of Gratitude

**Session 2: 9:00 am – 10:30 am (1.5 pts)**

- Gift Planning Prospects Identification

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

- Gift Planning Marketing

**Session 4: 1:00 pm – 2:00 pm (1.0 pts)**

- Tools to Determine Donor Affinity, Financial Capacity, and Philanthropic Motivations

**Session 5: 3:00 pm – 4:30 pm (1.5 pts)**

- Gift Planning Prospect Segmentation

**Session 6: 3:30 pm – 4:15 pm (0.75 pts)**

- Gift Planning in a Campaign

**Session 7: 4:15 pm – 5:00 pm (0.75 pts)**

- How to Construct a Gift Planning Program Workplan: A Primer

**Date: July 23, 2024**

**Session 1: 9:00 am – 10:00 am (1.0 pts)**

- A Leading Practice: Building a Collaborative Team

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

- Building Donor Relationships: A Suite of Strategies

**Session 3: 1:00 pm – 2:00 pm (1.0 pts)**

- Blended Gift Strategies

**Session 4: 2:00 pm – 2:45 pm (0.75 pts)**

- Building a Donor Fact Pattern: Leading Practice Questions

**Session 5: 3:00 pm – 4:00 pm (1.0 pts)**

- The Gift Planning Conversation

**Session 6: 4:00 pm – 5:00 pm (1.0 pts)**

- Before the Ask

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 24, 2024**

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

- Gift Planning Case Studies: Donor Scenarios and Recommendations

**Session 2: 10:45 am – 11:45 am (1.0 pts)**

- Working With Professional Advisors

**Session 3: 11:45 am – 12:15 pm (0.75 pts)**

- Ethics in Fundraising/Gift Planning

**Date: July 25, 2024**

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

- Stewardship and Recognition Strategies

**Session 2: 10:15 am – 11:15 am (1.0 pts)**

- Impact Reports: A Framework

**Session 3: 11:15 am – 12:00 pm (0.75 pts)**

- Counting vs. Accounting

**Session 4: 1:00 pm – 1:45 pm (0.75 pts)**

- Gift Administration

**Session 5: 1:45 pm – 2:15 pm (0.5 pts)**

- Interviewing a Gift Planning Prospect

**Session 6: 2:15 pm – 2:45 pm (0.5 pts)**

- Gift Design

**Session 7: 3:00 pm – 3:30 pm (0.5 pts)**

- Interviewing a Gift Planning Prospect

**Session 8: 3:30 pm – 4:45 pm (1.0 pts)**

- Finalize Work Plan

**Total number of points attained: \_\_\_\_\_/27.75**

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/>