

Certificate in Planned Giving Management



The Certificate in Planned Giving Management is a comprehensive program designed to equip fundraising professionals with the expertise needed to develop and manage effective planned giving programs. This certificate program covers a wide range of topics, from foundational principles to advanced strategies, ensuring participants gain a deep understanding of both the technical and nontechnical aspects of planned giving.

REQUIRED COURSES INCLUDE

Planned Giving: Getting the Proper Start

Learn the essentials of integrating planned giving into your fundraising program. Topics include the benefits to organizations and donors, blending major and planned gifts, financial planning basics, and identifying and communicating with prospective donors. Participants will also explore ethical considerations and steps to initiate a planned giving program.

Planned Giving: Beyond the Basics

Develop the knowledge and tools needed to grow a successful planned giving program. This course covers both technical and strategic aspects of planned giving. Learn about complex assets, deferred and life income gifts, CLTs, DAFs, and Private Foundations, and apply this knowledge through advanced case studies and practical applications.

Planned Giving: Building an Effective Program

Unlock the potential of planned giving to enhance your organization's fundraising efforts with this comprehensive course. Learn advanced marketing strategies, planned gift administration, donor recognition, and more, while gaining the tools to develop a successful planned giving program.

PROGRAM OBJECTIVES

By completing the Certificate in Planned Giving Management, participants will:

- Gain a comprehensive understanding of planned giving principles and strategies.
- Develop the skills to identify, cultivate, and manage planned giving donors.
- Learn to effectively market and communicate planned giving opportunities.
- Navigate the legal and ethical landscape of planned giving.
- Implement and enhance planned giving programs within their organizations.



This certificate program is ideal for nonprofit professionals, development officers, and anyone involved in fundraising who is looking to expand their planned giving expertise and drive their organization's fundraising success.

