



CAGP-ACPDP™

The **Top 6** Webinar Series

W3: Major Gifts: Incorporating Gift Planning

February 8, 2012 at 12p.m EST

Jill Nelson and Greg Lichti

Webinar Description:

As Major Donors seek to support causes in greater and more creative ways, it's essential to understand the ways they can give from both cash flow and assets. However, it isn't necessary to have "expert" gift planning knowledge to take a holistic approach to your donor's giving. This webinar will get you on your way to including planned gifts in your major gift asks by addressing:

- Essential gift planning knowledge to give you confidence;
- Spotting opportunities for current, deferred, and combined gifts
- How to graciously accept and manage planned gifts;
- Recognize and overcome common obstacles to incorporating gift planning in a major giving shop.

The Princess Margaret Hospital Foundation team places a particular emphasis on discussing the full range of giving options with major donors, including planned gifts. Greg, Jill and their colleagues are responsible for raising over \$35M annually in major and planned gifts to support world-leading cancer research.

About Jill & Greg:



Greg Lichti, CFRE, is Vice-President, Development. Greg has an Honours B.A. in History and Applied Studies from the University of Waterloo and Master of Divinity and Master of Social Work degrees from the University of Toronto. Greg is a past Chair of the CAGP-ACPDP National Board, a graduate of CAGP-ACPDP's Canadian Gift Planning course and has served as chair of the Greater Toronto Area RoundTable and as co-chair of the 2004 CAGP-ACPDP™ National Conference.

Jill Nelson, CFRE, is Senior Director, Estate Giving. Now clocking 20 years of fundraising in various organizations, Jill believes that seeing the donor as a complete being, rather than defining them by their preferred giving method, is a key to success. Jill is a popular speaker at AFP, CAGP events, and has played many volunteer and leadership roles for CAGP and CFRE. She is currently chairing the CAGP National Conference Programme committee for the 2012 Conference in Victoria B.C.

