

2020 training workshops

Charitable Organization Endowment Program



seeds of planned giving

All Sessions 11:30 a.m. to 1 p.m. | Lunch Included
Oklahoma City Community Foundation, 1000 N. Broadway Ave

Exclusively for organizations with endowments at the Oklahoma City Community Foundation, these sessions will help you learn the language of planned giving and develop a program to foster these strategic gifts.

- JAN 16** **Planned Giving 101.** All the basics you need to know about donor-centered gifts, including tax benefits and donor psychology.
- FEB 19** **The Easy Ask.** All about bequests, including why they are an easy pursuit with your longtime donors.
- MAR 12** **To Give and to Get.** All about charitable gift annuities (CGAs) and why your nonprofit is losing out if you're not offering them.
- APR 16** **Funds with Benefits.** All about charitable remainder trusts (CRTs) and how your donors can receive tax savings and a lifetime income stream.
- MAY 14** **Level Up.** Take your planning to the next level with creative giving strategies such as charitable lead trusts, retained life estate gifts and other tools for your donor-centered toolbox.
- JUN 18** **Talk About It.** Learn how to market donor-centered gifts, including leveraging your access to OCCF's legacy giving site and other online tools.

Bonus Brown-Bag Sessions: Bring your lunch for deep dives into case studies to learn all about the psychology behind donor-centered gifts and tips and techniques for having meaningful conversations with your supporters. All sessions 11:30 a.m. to 1 p.m. Bring your own lunch, beverages provided.

August 19
September 16
October 21

Register at occf.org/coetraining



focus on endowment

All Sessions 8:30 to 9:30 a.m. | Light Breakfast Included
Oklahoma City Community Foundation, 1000 N. Broadway Ave

Exclusively for organizations with endowments at the Oklahoma City Community Foundation, these sessions will offer strategies to build and sustain your endowment fund to become a vital resource for your nonprofit's future.

- JAN 29** **Nonprofit Speed Dating.** Visit with OCCF staff to learn how you can further engage through planned giving resources, grants and matching gifts.
- MAR 25** **Endowment 101.** All about the basics of endowment and how to leverage this important resource for your nonprofit.
- MAY 20** **Case studies and Success Stories.** We'll look at organizations, large and small, who are killing it at the endowment game.
- JUL 29** **Keeping up with Your Endowment.** How to use DonorCentral and online tools to maximize your success.
- SEP 30** **Making a Plan.** A hands-on session offering a step-by-step guide on how to help you move past your obstacles and start an endowment growth campaign.

Register at occf.org/coetraining

Questions? Contact Jennifer Meckling at 405/606-2951.



OKLAHOMA CITY COMMUNITY FOUNDATION



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For more information

occf.org/coetraining

save the date

Charitable Organization Endowment Program
2020 Training Workshops

Exclusively for organizations with endowments at the Oklahoma City Community Foundation.



seeds of planned giving

Seeds of Planned Giving Series will help you learn the language of planned giving and develop a program to foster these strategic gifts.



focus on endowment

Focus on Endowment will offer strategies to build and sustain your endowment fund to become a vital resource for your nonprofit's future.



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