

Getting Started in Planned Giving (Canadian Edition)



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Learning Outcomes

- Describe planned giving, using an easy-to-understand definition.
- List the most common types of planned gifts.
- Decide whether your organization is ready to start a planned giving program.
- List the 10 steps in creating a successful planned giving program.
- Explain how planned giving and endowment-building are related.

Course Level

- Introductory — no suggested prerequisites.

Certification Credits

- Take the optional final quiz. If you pass with 70% or more, you can download a Campus Certificate of Completion.
- Participation in the course is applicable for 2 points in Category 1.B – Education of the CFRE International application for initial certification and/or recertification.

Duration

- This course takes about two hours to complete, but you'll have full access to the course for three months. Move through it at your own pace: all at once; in short modules; breeze through once, then come back for a refresher down the road. You're in complete control, so learn at the times and speed that work best for you.

Price

- \$127 per user*; 3 months unlimited access.

Guaranteed

- All courses are fully guaranteed. If you aren't completely satisfied with your course, please just let us know and we'll happily refund the full course fee, no questions asked.

Free Demo

- Try a free demo version of any Campus course to see how practical, friendly, and fun they are to use.

Approved Provider For



Continuing Education

Visit: CharityVillageCampus.com
E-mail: campus@charityvillage.com

* Prices subject to change without notice.

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Downloadable Resources

- Each Campus course includes a series of downloadable resources, a toolkit of worksheets, checklists, samples, reviews, and additional references that you can take away with you and pull out anytime you need them in the future.

Resources included in this course:

- Planned giving terms and definitions
- Definition of planned giving
- Planned giving readiness checklist
- Sample case for support
- Planned giving policies and procedures resource
- Donor recognition and stewardship
- Measuring your progress
- Partnering with a community foundation
- Additional references

System Requirements

- Windows: Windows 98 SE or newer, Microsoft Internet Explorer 5 or Mozilla Firefox web browser, Macromedia Flash Player 7, Windows Media Player 9, broadband (e.g. Cable/DSL) Internet connection (dial-up users, please contact us), minimum screen resolution of 1024x768, sound card and speakers or headphones recommended.
- Macintosh: Mac OS X 10.2 or newer, Apple Safari or Mozilla Firefox web browser, Macromedia Flash Player 7, QuickTime 5, broadband (e.g. Cable/DSL) Internet connection (dial-up users, please contact us), minimum screen resolution of 1024x768, speakers or headphones recommended.

“Wow, that was such fun! The quizzes are fun, and easy to do, well structured - and I love the positive feedback. Very visually appealing. You make it fun to learn.”

– Meg Clarke, consultant, Vancouver, BC

