THE RESOURCE INSTITUTE FOR ESTATE AND GIFT PLANNING

This powerful course involves three sessions designed to be attended as a comprehensive unit of instruction although individual sessions can be selected. Whether you want to learn the basics of estate and gift planning or you would like a refresher course on the latest planned giving options, The Resource Institute for Estate and Gift Planning can meet your professional needs. All sessions involve the extensive use of continuously updated PowerPoint presentations.

RDI Consulting has offered this basic training course since 1979. This course includes reading and written homework assignments prior to Sessions 2 and 3.

Course fee for comprehensive course, all three sessions: $1,195 (includes all texts)

planned giving

Introduction to Development and Planned Giving

Session 1 is an overview of estate planning, planned giving and development basics for beginners or a refresher course for veteran gift planning professionals. This session serves as a foundation for the remainder of the course.

Topics include:

- Importance of planned giving to your overall development program.
- Basics of estate planning and estate tax planning.
- Basics of the income tax rules pertaining to charitable gifts.
- Marketing techniques for soliciting major gifts.
- Tax-wise techniques that produce major gifts.
- How to develop your major gifts and planned giving program.
- Demographics in this decade and beyond.
- How to gather information for an estate analysis.

Course fee: $300
Length: 2 days

Estate Planning for the Planned Giving Officer

Session 2 covers the basics of estate planning that are essential to success in planned giving. Many estate planning options are reviewed and practical strategies are discussed.

Topics include:

- Reducing estate shrinkage.
- Planning for the Federal estate tax and Federal gift tax.
- Planning for married estate owners.
- Planning for single estate owners.
- Advanced estate planning for larger estates.
- Valuation of closely held businesses and real estate.
- The use of the revocable living trust and other trusts.
- How to deliver and present a tax impact statement and estate analysis.
- Life insurance and commercial annuity essentials.

Text: *Protect Your Estate*
by Robert A. Esperti and Renno L. Peterson

Course fee: $495 (includes text)
Length: 2 days

Fundamentals for the Successful Planned Giving Program

Session 3 covers the fundamentals of planned giving that are needed to be an effective planned giving officer. It also covers the essentials of building and operating a productive planned giving program.

Topics include:

- Tax implications for charitable giving.
- Major donor solicitation.
- Creative tax planning for income and estate tax.
- Marketing charitable life income plans.
- The gift annuity and deferred gift annuity.
- The charitable remainder unitrust, annuity trust and pooled income fund.
- The charitable income lead trust.
- Overview on tax calculations for all arrangements.
- Closing planned giving agreements.
- Final review with participant case studies.

Texts: *Planned Giving Management*
by RDI Consulting, LLC.
Guide to Charitable Giving
by PriceWaterhouseCoopers.

Course fee: $595 (includes text)
Length: 2 1/2 days

Winter/Spring Course

Session 1: January 14-15, 2010
Session 2: March 18-19, 2010
Session 3: May 19-21, 2010

Summer/Fall Course

Session 1: July 15-16, 2010
Session 2: September 16-17, 2010
Session 3: November 10-12, 2010

To register call
Toll Free 1-800-659-7445.
You can also enroll on the RDI Consulting website at www.RDInow.com.

Training Location

PRYOR LEADERSHIP CENTER
William Jewell College
Liberty, Missouri
To reserve a room contact:

Fairfield Inn-Marriott
(816) 792-4000

Several organizations that have enhanced their gift planning skills through RDI:

- American Bible Society
- Back to the Bible
- The Baptist Foundation of Oklahoma
- The Baptist Home of Missouri
- The Bible League
- Catholic Charities of Omaha
- CRISTA Ministries of Seattle
- John Brown University
- Methodist Home of Texas
- Missouri Baptist Childrens Home
- Missouri Baptist Foundation
- Moody Bible Institute of Chicago
- Oklahoma Baptist University
- Oklahoma Methodist Foundation
- Peale Center for Christian Living
- Prison Fellowship Ministries
- Saint Louis Symphony
- SIM International
- Southwest Baptist University
- Star of Hope Mission of Houston
- Trans World Radio
- Union Rescue Mission

Our Faculty

Greg W. Lober is Director and Senior Consultant for the Resource Institute and a Certified Financial Planner who has conducted over a thousand public and professional seminars in estate planning, planned giving and the use of charitable trusts. Greg is coordinator and principle instructor of all institue training sessions. He has served as Senior Consultant for planned giving with some of the finest organizations in the nation.

Robert Kirkland, Attorney at Law, specializes in tax and estate planning. Mr. Kirkland has many years of hands on experience, which helps him bring special insights to his sessions on estate planning. Mr. Kirkland is a frequent speaker at various planned giving and estate planning conferences.

Jerald L. Hill, Attorney at Law, is a training instructor for RDI. Jerry has diverse experiences in estate planning and non-profit management that he brings to his sessions at the Resource Institute. Jerry served more than a decade as President of a national charitable organization.

James L. Hill is President and CEO of RDI Consulting. He has more than 35 years of leadership experience in ministry and non-profit organizations. Jim shares his expertise in resource development and strategy planning during selected sessions.

The Best Investment You'll Ever Make

To maximize your gift planning program in to day's competitive market, you must stay on top with the latest techniques and innovative ideas available to you. RDI training seminars are taught by seasoned professionals — experts in strategic planning and direct contact with non-profits and their donors across the country.

REGISTER TODAY!

To register call
Toll Free 1-800-659-7445.
You can also enroll on the
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Get your organization's planned giving into:

high gear

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