

CFBC Application for Lilly Family School of Philanthropy at IUPUI | The Fund Raising School



Planned Giving: Getting the Proper Start

The Community Foundation of Boone County is proud to partner with The Lilly Family School of Philanthropy at IUPUI to provide the Planned Giving: Getting the Proper Start, a 3-day course, to our local and surrounding county nonprofit leaders and financial advisors. This course would cost each individual \$1,285 to complete on your own. Through this opportunity, Boone County nonprofits and financial advisors (or nonprofits and advisors that serve Boone County) may take the course for \$250 upon approval student application. Surrounding county nonprofit leaders and advisors may attend for \$500--a savings of over \$700! This course provides 20 Continuing Education Units (CEU's) and/or 20.25 hours/20.25 CFRE education points. It counts one of four courses necessary to complete the Certificate in Fundraising Management (CFRM)

Class Description and Schedule

Planned Giving: Getting the Proper Start

If the thought of planned giving gives you a headache, you aren't alone! There's no denying that planned gifts can be complicated, but they are a critical piece of a successful development program, and many planned gifts are relatively easy to implement. In fact, experts suggest that planned giving holds the greatest potential for expanding fundraising and philanthropy.

IUPUI's faculty are expert practitioners who can demystify planned giving and help you understand the different planned giving options to discuss with your donors-by showing how planned gifts can benefit them now, as well as serve your organization in the future. You will improve your ability to help donors achieve their long-term philanthropic goals while understanding how best to work with legal and financial professionals to match the right planned giving instrument with the right donor.

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| • Friday, March 9 | 8:00 a.m.-5:00 p.m. | Witham Hospital North Pavilion Community Room |
| • Thursday, March 15 | 8:00 a.m.-5:00 p.m. | Witham Hospital North Pavilion Community Room |
| • Friday, March 16 | 8:00 a.m.-5:00 p.m. | Witham Hospital North Pavilion Community Room |

Qualifications, Policies, & Additional Information

Space and funding is limited. Priority will be given to nonprofit leaders, nonprofit fundraisers, and nonprofit board members in Boone County. Next consideration will be given to organizations/individuals outside of Boone County that SERVE Boone County, with final consideration given to leaders outside of Boone County. More than one individual per organization may apply, however, based on number of applications received, we may limit participants to one student per organization.

Application deadline is 1/31/2018, however please know that space and funding is limited and we may not be able to accommodate all students. Applicants will be notified no later than 2/7/2018 of denial or acceptance. Payment of \$250 in-county tuition, upon approval of grant and application, is due no later than 3/1/2018. Payment must be complete by 3/9/2018. Out of county tuition of \$500, upon approval of application, is due by 3/1/2018.

It is the policy of this organization to provide equal opportunities without regard to race, color, religion, national origin, gender, sexual preference, age, or disability. Should you have any accommodation needs or requests please let us know via phone 765-482-0024 or 317-873-0210 or email Barb@communityfoundationbc.org

Return this page to CFBC



Contact Information

Nonprofit Affiliation/Org Name	
Name	
Title/Board Position	
Street Address	
City ST ZIP Code	
Work Phone	
Personal or Cell Phone	
E-Mail Address	
County of Employment	
County of Residence	

Agreement and Signature

By submitting this application, I affirm that the facts set forth in it are true and complete. I understand that if I am accepted as a participant in the planned giving course, as provided by the Community Foundation of Boone County, that I/my organization will be responsible for any remaining fees, not to exceed \$250.00 per Boone County participant and not to exceed \$500.00 for out-of-county participants (not serving Boone County). Should I not complete the course for any reason, I/my organization will still be responsible for any negotiated fees.

YES, I wish to apply for the Planned Giving courses provided through the Community Foundation of Boone County and the tuition assistance grant to attend at a discounted rate. (\$250.00 in-county, \$500 out-of-county)

Name (printed)	
Date	
Signature	
Executive/Board President Name & Signature (if nonprofit)	

Thank you for completing this application form and for your interest! To learn more about the Lilly Family School of Philanthropy at IUPUI, go to their website at www.philanthropy.iupui.edu. Please submit this form by email to Barb@communityfoundationbc.org or mail/deliver to Barb Schroeder, Community Foundation of Boone County, 102 N. Lebanon St. Ste. 200, Lebanon, IN 46052.