



CONTINUING EDUCATION POINTS TRACKER

CFRE International has developed this form as a way for you to quickly track (and keep in your files!) the continuing education sessions you have attended. Simply check the boxes next to the sessions you attended. At the end of the conference, add up the total number of hours. Keep this sheet and you will be ready to complete your application form. All of the session slots listed are eligible for continuing education points on your CFRE application for initial certification and/or recertification. Sessions not listed here are not eligible for points.

Activity Organizer: - Chicago Council on Planned Giving
Title of Activity: - CCPG 2024 Annual Symposium Charitable Gift Planning
Names of Presenter(s): - Various
Dates and Location: - 22 May, 2024 – Chicago, IL USA

Date: 22 May, 2024

Session 1: 9:00am – 10:15am (1.25 pts)

- Sewing Life Insurance and Charitable Giving Together
- Navigating the Bias Seam – Maintaining the Dignity of Clients While Also Demonstrating Their Need
- Improving Donor Conversations with Investment Knowledge and Next Level Charitable CGA Strategies

Date: 22 May, 2024

Session 2: 10:30am – 11:45am (1.25 pts)

- The Black Bequest Gap: Research Highlights, and How this can Transform our Legacies and Values
- Understanding the Tapestry of Affluent Donors: Demographic Factors, Motivations, and the New Approaches to Giving
- Why Bequest Commitments Fail

Date: 22 May, 2024

Session 3: 12:30pm – 1:30pm (1 pt)

- Textiles as Cultural Storytellers and the Planned Giving Approach that Makes Them Possible

Date: 22 May, 2024

Session 4: 1:45pm – 3:00pm (1.25 pts)

- It's a Stitch Working with Women: Trends, Do's and Don'ts for Working with Philanthropic Women
- Stitch Together More Gifts with this One Important Thread
- Six Types of Private Equity

Date: 22 May, 2024

Session 5: 3:15pm – 4:30pm (1.25 pts)

- The Warp and Weft of Donor Advised Funds
- Understanding the Essential Elements of a Successful Planned Giving Program
- Stitching Together a Campaign Strategy that Drives PG Success

Total number of points attained: _____