

Dr. Russell James

Professor of Charitable Financial Planning
Texas Tech University



Date: August 7, 2023

Location: Marian H. Rochelle Gateway Center

Time: 9:00 AM - 4:00 PM

Lunch: 12:00 PM (Catered by UW Catering & Events)

Fundraiser Topics (9:00 AM - 12:00 PM)



SOCRATIC FUNDRAISING:

Using questions to advance the donor's journey



HOW TO TALK TO PEOPLE ABOUT WEALTH IN WAYS THAT INSPIRE MAJOR GIFTS OF ASSETS:

The science and the sentences



TOP 10 LEGACY FUNDRAISING STRATEGIES FROM SCIENTIFIC RESEARCH:

National data and results from the lab

Advisor Topics (1:00 PM - 4:00 PM)



TOP 10 CHARITABLE FINANCIAL PLANNING STRATEGIES FOR ADVISORS:

Helping your clients and your business with charitable planning



AMERICAN CHARITABLE BEQUESTS ACROSS THE CENTURIES:

New results from 360 years of national data on charitable bequest gifts



THE HIDDEN CODE OF END-OF-LIFE DECISIONS:

What legacy fundraising can learn from decision making in life insurance, annuities, and estate planning