



MODULE 1: Planned Giving Needs to Change Now

MODULE TOPIC	MAJOR TOPIC	CORE POINTS
Planned Giving Needs to Change Now	The Veritus Way of Planned Giving	Learn how Veritus is working to shift the traditional approach to planned and legacy giving. Understand the problem in the current planned giving approach.
	Who Needs to Be Involved	Understand who needs to be involved in the planned giving program. Get everyone on the same page to understand the role and purpose of planned giving.
	What Does the Research Say?	Learn what Veritus is seeing in the data and why it matters for how your organization approaches planned giving.
	The New Way of Planned Giving	Receive an overview of how to approach lead generation, staffing, stewardship, and portfolio make-up in planned giving to create more authentic donor relationships.



MODULE 2: Major and Planned Giving Need to Work Together

MODULE TOPIC	MAJOR TOPIC	CORE POINTS
Major and Planned Giving Need to Work Together	The Need for Collaboration	Learn common challenges that result in major gifts and planned giving teams not working together, which negatively impact the relationship with the donor.
	Shifting the Major Gifts Perspective on Planned Giving	Understand what you need to know about planned giving as an MGO. Learn what questions to ask, how to collaborate with the PGO on a donor, and when to trigger a move to planned giving.
	Shifting the Planned Giving Perspective on Major Gifts	Understand how to support major giving efforts in your planned giving work. Learn how to work with major gifts to identify prospects. Explore using permission-based asking in your conversations with legacy givers.