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plannedgivingday.org  
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Approved Provider for  
Continuing Education



## 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:** - National Capital Gift Planning Council  
**Title of Activity:** - 2025 Planned Giving Day  
**Names of Presenter(s):** - Various  
**Dates and Location:** - 17 June, 2025 – Washington DC, USA

### Date: 17 June, 2025

#### **Session 1: 9:00am – 10:30am (1.5 pts)**

☐ - Leading Through Uncertainty: Fundraising Lessons from Times of Crisis

### Date: 17 June, 2025

#### **Session 2: 11:00am – 12:00pm (1 pt)**

☐ - Donor Engagement: Trust, Transparency, and Technology: Navigating the Planned Giving Journey with Boomers  
☐ - Behind the Scenes: Portfolio Management for Organizations of All Sizes  
☐ - Getting Technical: A Fiduciary's Guide to Planned Giving Assets

### Date: 17 June, 2025

#### **Session 3: 12:00pm – 1:00pm (1 pt)**

☐ - Creating Legacies That Change the World with Amiee Griffin, Principle of Life & Legacy Counselors

### Date: 17 June, 2025

#### **Session 4: 2:30pm – 3:30pm (1 pt)**

☐ - Donor Engagement: Legacy Lift: Mastering the Art of Planned Gifts  
☐ - Behind the Scenes: Following the Donor Journey from Intention to Maturity: Securing Bequests, Honoring Legacies  
☐ - Getting Technical: Post-Death Estate Litigation: Navigating Legal and Other Challenges for Charities

### Date: 17 June, 2025

#### **Session 5: 3:45pm – 4:45pm (1 pt)**

☐ - Donor Engagement: Hosting Your First/Next Virtual Workshop  
☐ - Behind the Scenes: Maximizing Impact with Limited Resources: Leveraging Marketing and Technology to Scale Planned Giving  
☐ - Getting Technical: Harnessing the New Wave of Giving: Integrating DAFs, QCDs, and More into Your Planned Giving

**Total number of points attained: \_\_\_\_\_**

Courses Marked **NFR** (Non Fundraising Related) may be counted towards the 10 point maximum of NFR Courses on the initial CFRE application and the 5 point maximum on the re-certification application.