Training Course on Philanthropy and Charitable Giving in Retirement

Professional Development Training Course Outline

Category	Pension and Retirement	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

As individuals transition into retirement, many seek ways to give back to their communities and make a positive impact on causes they care about. Philanthropy and charitable giving can enhance the retirement experience, providing a sense of purpose and fulfillment. Training Course on Philanthropy and Charitable Giving in Retirement is designed to equip retirees and those approaching retirement with the knowledge and tools to engage in effective charitable giving. Participants will explore various aspects of philanthropy, including understanding personal values, selecting causes, and creating a structured giving plan. The course will also cover tax considerations, the impact of technology on charitable giving, and strategies for involving family members in philanthropy. By understanding the importance of giving and how to do it effectively, retirees can make meaningful contributions while aligning their charitable efforts with their overall financial and personal goals.

Programme Curriculum

Training Course on Philanthropy and Charitable Giving in Retirement

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Course Objectives

1. Understand the significance of philanthropy and charitable giving in retirement.
2. Identify personal values and priorities in selecting charitable causes.
3. Explore different methods and vehicles for charitable giving.
4. Analyze tax implications and benefits of charitable contributions.
5. Discuss the role of family involvement in philanthropy.
6. Explore the impact of technology on charitable giving.
7. Develop a structured giving plan aligned with retirement goals.
8. Review successful case studies of philanthropy in retirement.
9. Identify local and global causes that resonate with retirees.
10. Discuss methods for researching and evaluating nonprofit organizations.
11. Analyze the emotional and social impacts of giving on retirees.
12. Explore strategies for promoting philanthropic values within families.
13. Create actionable steps for implementing a personal giving strategy.

Target Audience

1. Individuals approaching retirement or newly retired.
2. Financial advisors and planners.
3. Nonprofit professionals and fundraisers.
4. Family members of retirees interested in philanthropy.
5. Community organizers and volunteers.
6. Social workers and advocates in aging services.
7. Academics and researchers in nonprofit management.
8. Anyone interested in enhancing their charitable giving strategies.

Course Duration: 5 Days

Course Modules

Module 1: Introduction to Philanthropy in Retirement

- Define philanthropy and its importance in retirement.
- Discuss the benefits of charitable giving for retirees.
- Explore different motivations for philanthropy.
- Analyze the emotional and social impacts of giving.
- Identify key terminology related to philanthropy.

Module 2: Identifying Personal Values and Causes

- Discuss the process of identifying personal values.
- Explore how values influence charitable choices.
- Analyze methods for researching and evaluating causes.
- Identify local and global issues that resonate with retirees.

- Review case studies of individuals finding meaningful causes.

Module 3: Methods and Vehicles for Charitable Giving

- Discuss various methods of giving (cash, assets, time).
- Explore different vehicles for philanthropy (donor-advised funds, foundations).
- Analyze the benefits and drawbacks of each method.
- Identify opportunities for planned giving and bequests.
- Review case studies of effective giving strategies.

Module 4: Tax Implications and Benefits of Charitable Contributions

- Discuss the tax benefits associated with charitable giving.
- Explore how to maximize tax deductions through donations.
- Analyze the implications of gifting appreciated assets.
- Identify strategies for tax-efficient giving.
- Review case studies of successful tax planning in philanthropy.

Module 5: Family Involvement in Philanthropy

- Discuss the importance of involving family in charitable giving.
- Explore methods for initiating family conversations about philanthropy.
- Analyze the benefits of shared values and collective giving.
- Identify ways to engage younger generations in charitable efforts.
- Review case studies of families successfully collaborating on philanthropy.

Module 6: The Role of Technology in Charitable Giving

- Explore how technology is changing the landscape of philanthropy.
- Discuss online giving platforms and crowdfunding.
- Analyze the impact of social media on charitable campaigns.
- Identify tools for tracking donations and impact.
- Review case studies of technology-driven philanthropic initiatives.

Module 7: Developing a Structured Giving Plan

- Discuss the importance of creating a structured approach to giving.
- Explore components of a comprehensive giving plan.
- Analyze how to align charitable goals with personal and financial objectives.
- Identify resources for developing a giving strategy.
- Review case studies of individuals with successful giving plans.

Module 8: Measuring Impact and Success in Philanthropy

- Discuss methods for assessing the impact of charitable contributions.
- Explore tools for measuring the effectiveness of giving.
- Analyze the importance of feedback from nonprofit organizations.
- Identify best practices for adjusting giving strategies based on outcomes.
- Review case studies of successful philanthropic impact measurement.

Training Methodology

- **Interactive Workshops:** Facilitated discussions, group exercises, and problem-solving activities.

- **Case Studies:** Real-world examples to illustrate successful community-based surveillance practices.
- **Role-Playing and Simulations:** Practice engaging communities in surveillance activities.
- **Expert Presentations:** Insights from experienced public health professionals and community leaders.
- **Group Projects:** Collaborative development of community surveillance plans.
- **Action Planning:** Development of personalized action plans for implementing community-based surveillance.
- **Digital Tools and Resources:** Utilization of online platforms for collaboration and learning.
- **Peer-to-Peer Learning:** Sharing experiences and insights on community engagement.
- **Post-Training Support:** Access to online forums, mentorship, and continued learning resources.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.com or call +254769199797

Certification

Upon successful completion of this training, participants will be issued with a globally recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

- Participants must be conversant in English.
- Upon completion of training, participants will receive an Authorized Training Certificate.
- The course duration is flexible and can be modified to fit any number of days.
- Course fee includes facilitation, training materials, 2 coffee breaks, buffet lunch, and a Certificate upon successful completion.
- One-year post-training support, consultation, and coaching provided after the course.
- Payment should be made at least a week before the training commencement to FINESKILL TRAINING CENTER account, as indicated in the invoice, to enable better preparation.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
07 Sep 2026	11 Sep 2026	Physical	$1,500
14 Sep 2026	18 Sep 2026	Physical	$1,500
21 Sep 2026	25 Sep 2026	Physical	$1,500
28 Sep 2026	02 Oct 2026	Physical	$1,500
05 Oct 2026	09 Oct 2026	Physical	$1,500
12 Oct 2026	16 Oct 2026	Physical	$1,500

Start Date	End Date	Location	Price
19 Oct 2026	23 Oct 2026	Physical	$1,500
26 Oct 2026	30 Oct 2026	Physical	$1,500

Ready to enroll or request a customized program? Book online or contact us:

Register Online Now

Email: info@fineskilltrainingcenter.com | Website: www.fineskilltrainingcenter.com