



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: - American Council on Gift Annuities
Title of Activity: - ACGA 36th Conference
Names of Presenter(s): - Various
Dates and Location: - April 29 – May 1, 2024 – Houston, TX USA

Date: April 30, 2024

Session 1: 8:00am – 9:15am (1.25 pts)

- Under the Microscope: Understanding Your Leadership Lens

Date: April 30, 2024

Session 2: 9:30am – 10:45am, 11:30am – 12:45pm (2.5 pts)

- Next-Level CGA Strategies: Fulfilling Donor Needs
- The Power of Deferred Gift Annuities
- Winning With Gift Annuities: Best Practices
- Giddy-Up Your Marketing

Date: April 30, 2024

Session 3: 1:00pm – 2:00pm (1 pt)

- Gift Annuity Rates and ACGA Update

Date: April 30, 2024

Session 4: 2:15pm – 3:30pm, 4:15pm – 5:30pm (2.5pts)

- Building a Comprehensive Charitable Gift Annuity Program: Strategies & Partner Selection
- Warning Signs: Identifying and Mitigating Risks in CGA Pools
- The Good, The Bad, & The Ugly of the New QCD for Life Income Plans
- AI in Action for Advanced Gift Planning

Date: May 1, 2024

Session 5: 7:10am – 8:30am (1.25 pts)

- Everything You Wanted to Know About ACGA Research

Date: May 1, 2024

Session 6: 8:45am – 10:00am, 10:45am – 12:00pm (2.5 pts)

- Collaborative Discussion: Gift Planning Case Study
- Spilling the (Texas) Tea: Disclosing the Secrets to Surface and Subsurface Gifts
- Good Gifts Gone Bad
- State Regulations: What You Need to Know

Total number of points attained: _____