

Managing Financial and Legal Risk

June 6, 2024



Course Description: Unlock the power of financial foresight and legal acumen by joining our exclusive Lunch and Learn session on "Managing Financial and Legal Risk." In this 1 1/2 hour course, participants will delve into the intricacies of safeguarding endowments, navigating planned gifts, and crafting meticulous gift acceptance policies. The session aims to empower participants with the knowledge and skills needed to ensure a resilient and thriving future for their organizations. Through interactive discussions, case studies, and practical exercises, attendees will gain valuable insights into mitigating financial and legal risks, thereby enhancing the overall sustainability and success of their institutions.

Course Objectives:

Participants will be able to:

- Articulate the importance of financial & legal risk management for stable financial health.
- Demonstrate the ability to safeguard endowments through effective risk mitigation strategies.
- Understand the legal implications and communication strategies for a planned gift program.
- Enhance their role within their organizations by contributing to the development of a resilient and forward-thinking financial and legal risk management framework.

Agenda:

Welcome and Introduction (10 minutes)

- Welcome and Introduction to the Course
- Overview of the Importance of Financial and Legal Risk Management

Understanding the Importance of Financial and Legal Risk Management (20 minutes)

- Explore the Significance of Proactive Risk Management
- Identify Potential Risks Associated with Endowments, Planned Gifts, & Gift Acceptance Policies
- Q&A and Group Discussion

Safeguarding Endowments

- Examine Best Practices for Managing and Protecting Endowments
- Learn Strategies to Optimize Endowment Performance while Minimizing Risk
- Case Study: Analyzing Endowment Management
- Interactive Discussion and Q&A

Navigating Planned Gifts (20 minutes)

- Understand Various Types of Planned Gifts and Legal Implications
- Develop Skills in Effectively Communicating with Donors on Planned Giving Options
- Case Study: Successful Implementation of Planned Giving
- Interactive Discussion and Q&A

Crafting Meticulous Gift Acceptance Policies (10 minutes)

- Explore Key Elements of Comprehensive Gift Acceptance Policies
- Review Sample Policies that Align with Legal Requirements

Case Studies (15 minutes)

- Analyze Real-world Case Studies to Reinforce Theoretical Knowledge

Q&A and Learning Outcomes Review (10 minutes)

- Recap of Key Takeaways
- Review of Learning Outcomes
- Closing Remarks and Acknowledgment



Dr. Kylie Henderson

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Dr. Kylie Henderson earned her Juris Doctorate from Florida State University in 2006. She holds a BA in Criminal Justice from UWF and earned her Associates in Criminal Justice from Pensacola Junior College. Kylie currently serves as the Director of the Center for Nonprofit Excellence and Philanthropy at PSC and is excited about the opportunity to create safe and fair communities through education. She began teaching criminal justice and paralegal courses at PSC in 2017 and most recently served as the Coordinator for Assessments at Pensacola State College. Kylie is a committed member of her community and regularly gives back through volunteer service. She has tutored at-risk student athletes, supported PSC Foundation events and served as a program manager for recreational youth basketball. Kylie has three beautiful children, Kayla, Abby and Kody and is a grandmother to Lyla and Rowan. When she isn't working for the College or helping in her community, Kylie enjoys spending quality time with her family.