In this presentation, Paul Caspersen, CFP®, AEP®, MS will provide some updates in the dynamic evolution of AI in charitable gift planning since his last presentation with Bryan Clontz on this topic in April 2023. Participants will delve into a systematic 5-step process for analyzing charitable gifts, juxtaposed with the latest planned giving research tools. Caspersen will discuss best practices for incorporating AI and other technologies into technical planned giving research, and donor communication. Through compelling case studies, he will illustrate the successful integration of these technologies in the field. The session will be enriched by interactive dialogue, inviting audience contributions on their current use of AI in planned giving strategies. This presentation promises to furnish attendees with actionable insights.