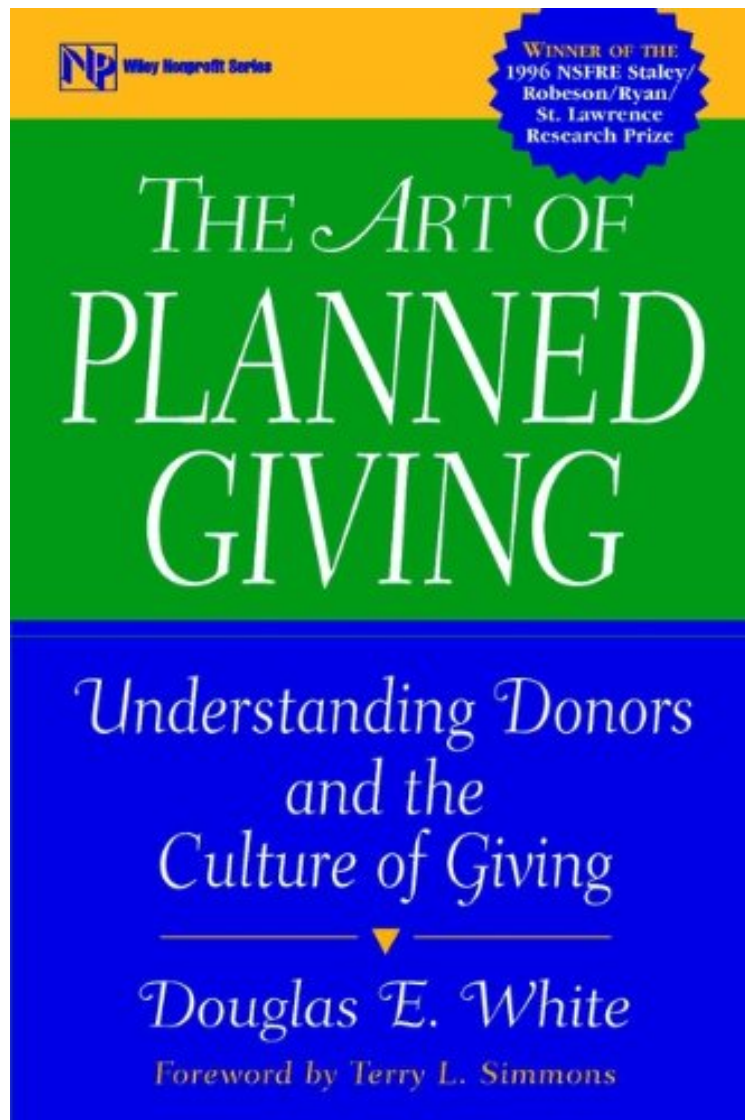


[Mobile pdf] The Art of Planned Giving: Understanding Donors and the Culture of Giving (Wiley Nonprofit Law, Finance and Management Series)

The Art of Planned Giving: Understanding Donors and the Culture of Giving (Wiley Nonprofit Law, Finance and Management Series)

Douglas E. White

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Douglas E. White : The Art of Planned Giving: Understanding Donors and the Culture of Giving (Wiley Nonprofit Law, Finance and Management Series) before purchasing it in order to gage whether or not it would be worth my time, and all praised The Art of Planned Giving: Understanding Donors and the Culture of Giving (Wiley Nonprofit Law, Finance and Management Series):

0 of 0 people found the following review helpful. Worthwhile read for an intro to planned giving. By Jack Winn I am a

trustee for a local foundation who didn't know much about planned giving except that it held the promise of the goose with a golden egg. I found the book enlightening in terms of the complexity of planned giving options as well as the challenges in securing donor planned gifts. The author explained planned giving through vignettes about interactions between donors and planned giving officers which for me made what could have been a very boring book readable. 0 of 0 people found the following review helpful. This book is a gem and a classic! By CustomerWritten in 1998, this is a book that every serious student of fundraising should read and heed its wisdom. The author, Douglas White, is world renowned in the field of planned giving.

"A unique book with a unique approach, this is destined to become a classic." --Charitable Gift Planning News In this deeply humane and informative book, Douglas White deftly weaves together personal insight and level-headed advice in a probing look at the human side of planned giving. He helps you understand, develop, and use the interpersonal skills that are an essential part of every successful planned giving officer's art. White provides practical answers to such crucial questions as: How do I successfully approach a prospect for a planned gift? What are the steps to building a prospect's trust and instilling a sense of mission? How can I tell if I'm being too aggressive--or not aggressive enough? How do I handle a donor's lawyer and other advisors who don't support the gift? Tracing the entire process of acquiring a planned gift from the first phone call to managing the gift's assets, White offers many helpful pointers on how to deal with donors, their families, and their professional advisors, as well as executive directors and board members within your organization. He also helps you translate technical knowledge into planned gifts that are better for both donors and charities. The first book to take you beyond the mere mechanics and into the very soul of planned giving, *The Art of Planned Giving* is an important working resource for planned giving officers, fund-raising professionals and consultants, as well as nonprofit executives and board members.

From the PublisherBased on the author's expertise and interviews with planned giving officers, this book provides an inside look at the human side of this important segment of fund-raising and charitable giving. Traces the process of acquiring a planned gift; examines the psychological and professional challenges involved; and explains the culture within which a planned giving program functions. Includes practical advice on dealing with donors and their professional advisors and suggests effective approaches to becoming a successful planned giving officer.

From the Back CoverThe definitive analysis of what excellence in the field of planned giving requires "A comprehensive and deeply sensitive look at the realities of its subject, *The Art of Planned Giving* is a necessary guide for all those newly entering the gift planning field, and an essential reference for experienced fund-raisers and philanthropists alike." mdash;Marilyn M. Montgomery Director of Gift Planning University of Washington "The Art of Planned Giving sets forth a compelling argument for bringing a broader perspective to the pursuit of planned giftsmdash;encouraging us to balance technical knowledge and skills with a deeper understanding of what truly promotes philanthropy." mdash;C. Alan Korthals Manager, Gift Services The First Church of Christ, Scientist "The Art of Planned Giving leaves no stone unturned in defining the human as well as the technical elements which constitute the ingredients for successful solicitation and implementation of planned gifts." mdash;Susan Moore Marketing Director of Charitable Giving New York Life Insurance Company "Doug White's *The Art of Planned Giving* is an eloquent and thoughtful voyage through the myriad human challenges that confront all of us in the field of philanthropy." mdash;Caleb B. Rick, Director of Planned Giving and Charitable Gift Counsel The Sierra Club "Doug's discussion implicitly educates the reader on technical gift structures, but keeps the focus where it belongs: on the rewards of practicing philanthropy." mdash;Nancy Herrold Strapp, JD Director of Planned Giving Children's Hospital Foundation "The Art of Planned Giving is about doing planned giving right: understanding donors as human beings; understanding the many factors that cause people to emotionally connect with a charity's mission; appreciating their life experiences and how these experiences impact their motive to give; understanding, as if you were there, how it feels to be in the donor prospect's shoes during a planned giving visit; and appreciating the role of the other planned giving team members." mdash;From the Foreword by Terry L. Simmons Vice President and General Counsel Baptist Foundation of Texas "The language of philanthropy speaks to a person's heart and soul before it speaks to anything else. It must. If it did not, the tax benefits and the increased income so often touted as incentives to make a planned gift would add up to no incentive at all." mdash;Douglas E. White The art of planned giving entails much more than citing the tax code and spouting investment principles. Beneath all the technical issues lies the real challengemdash;a volatile, unquantifiable human dimension rarely dealt with in the professional literature. Now, in this deeply humane and informative book, Doug White deftly weaves together personal insight and level-headed advice in a probing look at the human side of planned giving. his practical guidance shows you how to understand, develop, and use the interpersonal skills that are an essential part of every successful planned giving officer's art. Instead of concentrating on lengthy technical discussions and tax tips found in other books on the subject, White cuts right to the heart of the psychological and professional challenges involved in the planned giving process. He draws upon his own experiences, as well as those of many colleagues, to provide practical answers to such crucial questions as: How do I successfully approach a prospect for a planned gift? What are the steps to building a prospect's trust and instilling a sense of mission? How can I tell if I'm

being too aggressive or not aggressive enough? How do I deal with donors who want a higher payout rate than is good for either them or the charity? How do I handle a donor's lawyer and other advisors who don't support the gift? With the help of an ongoing narrative, White traces the entire process of acquiring a planned gift, from the first phone call to managing the gift's assets. Along the way, he offers many helpful pointers on how to deal with donors, their families, and their professional advisors, as well as other nonprofit managers within your organization, from executive directors to board members. He also suggests strategies for translating technical knowledge into planned gifts that are better for both donors and charities. The first book to take you beyond the mere mechanics and into the very soul of planned giving, *The Art of Planned Giving* is an important working resource for planned giving officers, fund-raising professionals and consultants, as well as nonprofit executives and board members.

About the Author DOUGLAS E. WHITE is Director of Client Relations at Kaspick Co., a planned giving investment firm in Menlo Park, California, and Boston, Massachusetts. He assists nonprofit organizations with establishing planned giving policies and donor relations. He has served as Ethics Chair for the National Committee of Planned Giving (NCPG) and as president of the Planned Giving Group of New England. Currently a board member of NCPG, he is also a technical consultant to Paragon, the planned giving software created by Blackbaud, Inc.