

# Charitable Gift Planning

## *Ten Rules for Effective Gift Planning*



# Ten Rules for Effective Gift Planning

- Know the Rules
- Listen to the Donor
- Put It in Writing
- Look for Philanthropic Intent
- Be Honest



# Ten Rules for Effective Gift Planning

- Implement Policies & Procedures
- Seek Counsel
- Focus on Mission
- The Rule of “Too Good to be True”
- Ask Yourself Three Questions

# Ten Rules for Effective Gift Planning

## 10. Know the Rules

- Educate Yourself
- Educate Your Donors
- Educate Your Charitable Institution
- Educate Your Professional Partners

# Ten Rules for Effective Gift Planning

## 9. Listen to the Donor

- Communicate with them
- Get to Know Them
- Care about Them and Their Gift
- Be Protective of Them

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## 8. Put It in Writing

- Letters to Donors
- Letters to Attorneys
- Memos to Files
- Telephone Notes

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## 7. Look for Philanthropic Intent

- What is the chief motivation for the donor making the gift?
- How important are tax savings or deductions?
- How well do they know the organizations they want to include?

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## 6. Be Honest

- With Donors
- With Charitable Organizations
- With Other Professional Partners
- With Yourself



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## 5. Implement Policies & Procedures

- Do they exist at the Charity?
- Provides Protection to the Clients/Donors, Charity and You
- Allows Everyone to Focus on the Right Gift

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## 4. Involve Legal Counsel

- Counsel for Clients/Donors
- Counsel for Charitable Institution
- Initial Draft Documents
- Annual Review

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## 3. Focus on Mission

- What is the Charity's Mission?
- Does this Gift Further that Mission?
- Is There Philanthropic Intent?
- How Well Does the Donor Know the Charity?

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## 2. The Rule of “Too Good to Be True”

- Some Gifts are Too Good to be True
- Skepticism is a Good Thing
- It’s Okay for a Charity to Say “No”



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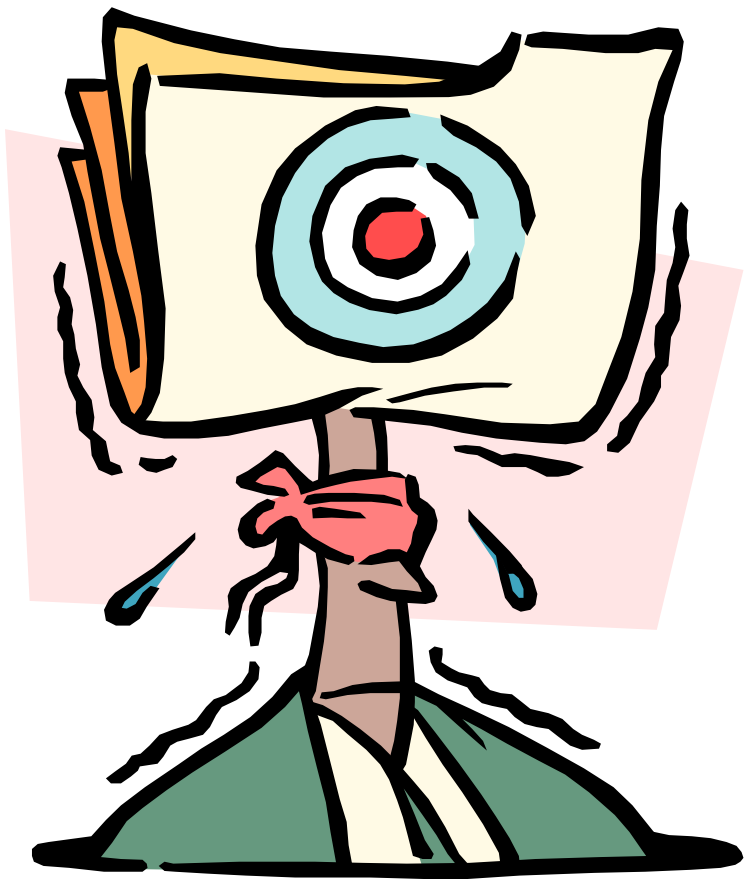
## 1. Ask Yourself Three Questions.....

How Would I Feel About this Gift if....

- I Read About it in the Newspaper?
- The Donors were my Grandparents?
- The Donors Were my Parents?



# Questions & Answers





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