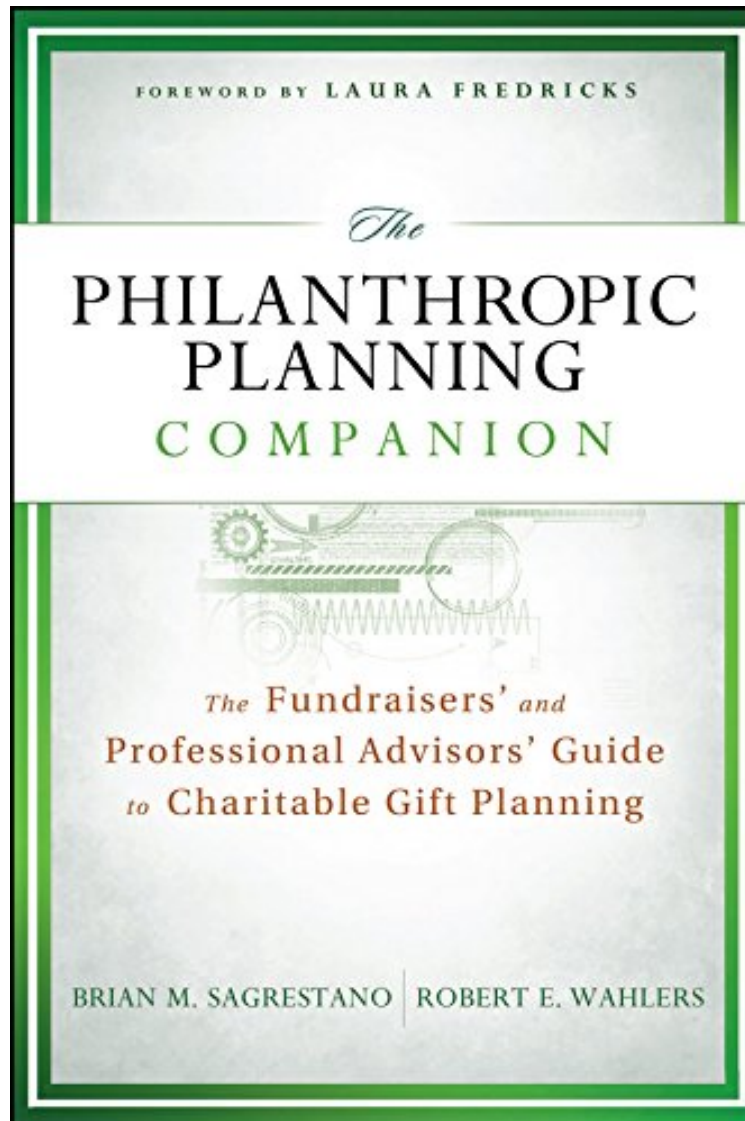


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The Philanthropic Planning Companion: The Fundraisers' and Professional Advisors' Guide to Charitable Gift Planning (The AFP/Wiley Fund Development Series)

Brian M. Sagrestano, Robert E. Wahlers
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0 of 0 people found the following review helpful. 'Within Arms Reach' By Thomas R. Ligare I just finished reading 'Philanthropic Planning Companion' and it is the most comprehensive and up to date reference guide about the nonprofit sector. This book is a must read and you will want to leave it on top of your desk for reference. I got started reading the book trying to understand generational differences in giving including what are the best planned giving vehicles within the different generations. What I found was so much more. This book is for advisors, donors and fundraisers. Not necessarily a book you sit down and read, but a book that you are constantly using as a reference. Congratulations to Brian Sagrestano and Robert Wahlers for putting together such a comprehensive piece of work! Tom Ligare, CLU President, Planned Giving Marketing Solutions

A donor-centered guide to charitable gift planning for fundraisers and professional advisors The Philanthropic Planning Companion compiles and analyzes the latest research on donor/client behavior, discussing the need for segmented approaches to charitable gift planning based upon the values and personal planning objectives of the donor/client. With its many tools, checklists and sample materials, it will serve as your charitable giving guide in your work with your donors/clients. Whether you are building your practice to work with high net worth clients or you are enhancing your fundraising program, this is the book you will keep close at hand. Outlines how an integrated, donor-centered, values-based, philanthropic planning approach can be implemented Explores the latest research focuses on donor behavior For fundraisers and professional advisors alike, The Philanthropic Planning Companion is the one-stop resource you'll keep by your side to help your donors/clients meet their charitable and personal planning objectives.

From the Inside Flap Philanthropic planning is a powerful way for individuals and families to give to the charities they believe in and care about. It ensures the charity's long-term future, while also meeting the donor's personal planning objectives. Drawing from authors Brian Sagrestano and Robert Wahlers' combined experience in financial, estate, tax, and gift planning, The Philanthropic Planning Companion explores the new and exciting donor-centered, values-based model of philanthropic planning for both professional advisors and fundraisers. Sagrestano and Wahlers start by explaining why emerging generational cohorts require charities and advisors to change their approach to philanthropy. The "New Philanthropists," consisting of the Baby Boomers, Generation X, and Millennials, have fundamentally different values and views on philanthropy and society than the "Traditionalist" generations that came before them. With the New Philanthropists now in their peak earning, giving, and planning years, a new model of philanthropic planning is vital if charities and advisors want to reach this audience and continue the golden age of philanthropy in America. Starting with discussion on the emergence of philanthropic planning, Sagrestano and Wahlers move on to outline how an integrated, donor-centered, values-based, philanthropic planning approach can help advisors and fundraisers meet the charitable and personal planning objectives of all philanthropists, starting with the top 10%, whose gifts comprise more than 95% of charitable dollars raised. In addition, the authors offer proactive suggestions for: Crafting an environment for philanthropic planning Establishing connections among fundraisers and advisors Utilizing technology and social media in reaching newer generations Filled with proven tools to ensure sustained success, The Philanthropic Planning Companion illustrates how advisors and fundraisers can design, develop, assemble, and create plans for individuals and families that will meet their goals and needs for generations to come.

From the Back Cover Praise for THE PHILANTHROPIC PLANNING COMPANION "A much-needed resource for advisors and gift planning officers who take a donor-centered, mission-driven approach. Well researched, practical, and passionate." —PHIL CUBETA, CLU, ChFC, MSFS, CAP, Sallie B. and William B. Wallace Chair in Philanthropy, The American College "Sagrestano and Wahlers have managed to capture all the essential elements of 'philanthropic planning' in a highly readable book that sets the stage by tracing the evolution of the gift planning field and then links in the critical demographic factors that differentiate multiple generations of charitable donors and prospects and the various approaches that work best with each." —CHRIS YATES, Associate Senior Vice President for Major and Planned Gifts, University of Southern California "Brian and Robert are two of the most

insightful and knowledgeable planned giving experts in the country. The Philanthropic Planning Companion is key in keeping abreast of the changes in the philanthropic planning world and ensuring that your program will be cutting edge. I urge you to read this book." mdash;WILLIAM D. SAMERS, Vice President, Planned Giving Endowments, UJA-Federation of New York "This book is a must-read and a great reference source for all involved in the philanthropic planning process. It presents a positive, but realistic, picture of trends in donor giving patterns and gift vehicles, and is peppered with practical guidance for soliciting, analyzing, and implementing a charitable gift. It is intended to apply to advisors and donors, as well as fundraisers at recipient charities, and will assist all in enhancing their respective practices in this complex and dynamic field." mdash;JONATHAN ACKERMAN, Esquire, Law Office of Jonathan Ackerman, LLC "Want to know how to reach Generation X and Millennials for planned gifts? Packed with helpful ideas for organizations just getting started in planned giving as well as seasoned professionals, this is a must-read for anyone who wants to grow and sustain a successful planned giving program." mdash;KRISTEN SCHULTZ JAARDA, JD, LLM, Senior Vice President, Crescendo Interactive Inc. "With everyone trying to give advice on every topic these days, I ask two simple questions: Is the advice based on practical and successful experience from people I respect? And, is it easy to take the recommendations from suggestions to action? The Philanthropic Planning Companion is both. Anyone interested in simplifying planned giving should consider adding it to their library." mdash;BRYAN CLONTZ, CFPreg., President, Charitable Solutions, LLC

About the Author

BRIAN M. SAGRESTANO, JD, CFRE, is the President and CEO of Gift Planning Development, LLC, a gift planning consulting firm. Previously, he ran gift planning programs for the University of Pennsylvania and Middlebury College and practiced law as a trust and estates attorney. He has been published in *Planned Giving Tomorrow* and *Planned Giving Mentor* and cited in numerous publications, including the *Chronicle of Philanthropy*. Brian is a regular presenter at national conferences and a past board member for several organizations, including the Partnership for Philanthropic Planning.

ROBERT E. WAHLERS, MS, CFRE, is the Senior Director of Development and Gift Planning for Meridian Health. After working as a financial and estate planner, he has spent more than twenty years in the nonprofit sector with organizations like the Boy Scouts of America and American Cancer Society. He has been published in *Planned Giving Mentor* and has been cited in the *Nonprofit Times* and *Advancing Philanthropy*. Robert is a national board member with the Partnership for Philanthropic Planning and serves on the faculty at Columbia University for the Master of Science in Fundraising Management program.