



The World's largest community of planned giving professionals

Marketing Your PGDC

2013 Edition

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Introduction

The success of the Planned Giving Design CenterSM ultimately will be measured by the number of planned gifts that members of the professional advisor community initiated and facilitated. As a hosting charitable organization, your task is to identify every advisor in your community who has access to the Internet and encourage them to subscribe to the PGDC. Our job is to maintain the content of the site at a level that is worthy of their continued interest and participation.

The purpose of this guide is to help you to identify professional advisors in your community who might be interested in becoming PGDC subscribers and provide you with ideas and tools that you can use to introduce the PGDC to them.

Successfully introducing the PGDC to professional advisors is not a secret; it is simply a combination of planning and executing the plan. Unlike asking for a gift, you are giving one — a unique resource that advisors can use to educate themselves with the latest industry insights and enhance the value of service they provide to their clients.

Our first step is the most important one: we must recognize who professional advisors are and what motivates them to become proactive charitable gift planners. Secondly, we will discuss the many ways in which you can introduce the PGDC to them.

Identifying Professional Advisors

Who are professional advisors and where do you find them? For the purposes of the PGDC, professional advisors include individuals who offer a service or product to people who have the capacity to make planned gifts. This definition yields a broad list of advisors, including:

- Attorneys
- Accountants
- Financial Planners
- Life Underwriters
- Trust Officers
- Registered Securities Representatives
- Real Estate Agents and Brokers
- Escrow and Title Officers
- Business Brokers
- Tangibles Dealers, Brokers, and Auction Houses
- Appraisers

Planned giving is a process, not a transaction. Process oriented advisors include those who help coordinate the gift planning process from start to finish. They tend to be individuals who are regularly involved in assisting clients in matters of tax, financial, and estate planning.

Generally, attorneys, accountants, life underwriters, and financial planners fit the description of processors. Depending on their background and the nature of their business, stockbrokers, trust officers, and registered investment advisors might also be included in this group. Given the nature of their businesses, process-oriented advisors need to stay current on all matters of tax, financial, and estate planning. Accordingly, this group comprises the core of PGDC membership and should be the primary focus of your marketing efforts.

We can think of the balance of those listed above as transactors. These individuals are not regularly involved in advising clients on matters of tax, financial, and estate planning; accordingly, they have less knowledge regarding the tools and techniques of planned giving. However, they also are positioned ideally to recognize planned giving opportunities among their clients.

Now we will look at each type of advisor and the best way to approach them with the PGDC. Consequently, we will focus on the financial, tax, and transactional motivations of clients and advisors without mentioning donative intent. However, once advisors are subscribed to the PGDC, we can share the vital role that donative intent plays in the gift planning process and why we always should discuss it along with planned giving.

Attorneys

Attorneys offer objective, authoritative and unbiased advice to clients on a myriad of legal issues. Because of what their practices are like and how individuals often consult them before entering into major transactions, attorneys play a significant role and can

substantially influence the planned giving process. Thus, the attorney often will quarterback the estate planning team.

Many attorneys have commented that even though they may specialize in tax and estate planning matters, they often do not have a great deal of transactional experience in the design and implementation of sophisticated planned giving arrangements. Remembering this is important because advisors don't recommend concepts with which they are unfamiliar. The PGDC can help bridge this gap of ignorance by providing detailed information on the latest in planned giving laws and techniques.

Like doctors, attorneys also specialize. Those specializing in tax and estate planning, corporate law, and real estate are obvious candidates for the PGDC. There are, however, individuals who may practice in areas that are a less obvious fit, but who might also be interested in what the PGDC offers them.

For example, let's assume that a six-figure charitable remainder trust is created to facilitate the sale of a business interest between divorced spouses. The referrer, a family law attorney representing one of the spouses, is very familiar with CRTs. Consequently, in the sale, he uses the CRT to eliminate a significant potential capital gains tax liability. Thus, out of the pain of a divorce comes the joy of making a significant gift to the hospital where the couple's children were born.

Lawyers can play a significant role in the planned giving process – from recognizing opportunities and introducing concepts to clients, to designing and analyzing the financial and tax consequences of a proposed gift, to drafting the documents necessary to complete the transaction.

Our advice, when identifying lawyers in your community, is that you present the opportunity to join the PGDC to all lawyers with whom you have (or wish to develop) a relationship. This allows them to decide if they would like to subscribe.

Accountants

The complexities and interrelationships of the federal and state income tax, gift, and estate systems make the accountant's participation in the planned giving process indispensable. Not only do accountants help clients comply with the tax law, but now they also take an increasingly proactive role in helping clients minimize their tax liability. Despite the steady decline of income tax reduction tools since 1986, charitable giving remains as one of the few tools to reduce taxes.

As with attorneys, accountants enjoy a high level of trust from their clients who rely on their advice and guidance concerning major transactions. For this reason, accountants can play a significant role in the success of an advisor referral system.

Like attorneys, accountants who also specialize in advising individuals and corporations in tax matters are your target audience. Conversely, people on the corporate audit side of the business are less likely to be interested.

Financial Planners

The Certified Financial Planner (CFP) designation is available to individuals who complete the equivalent of 18 college credit hours, generally completed over a two-year period, at the upper-division baccalaureate level at one of many colleges and universities throughout the country licensed with the International Boards of Standards and Practices for Certified Financial Planners, Inc., Denver, Colorado (IBCFP).

The CFP curricula include courses on financial planning, insurance, investments, income tax planning, retirement and employee benefit planning, and estate planning. Although financial planners do not have authorization to render legal or accounting advice, their role as a generalist positions them very well to identify planned giving opportunities among clients. As with lawyers and accountants, financial planners place high value on technical information they can use to help them assist their clients and their advisors with matters of charitable gift planning.

Life Underwriters

Even though life underwriters primarily focus on assisting clients with estate planning matters and providing them with insurance products that provide for their estate's liquidity needs, the life underwriter's services often intersect financial and retirement planning.

The previous comments regarding financial planners equally apply to life underwriters. Charitable giving offers an ideal opportunity to reduce estate taxes and sell life insurance in order to provide wealth replacement and estate liquidity. As a result, many life insurance companies have invested significantly in providing education and marketing materials to agents who are interested in offering planned giving assistance to their clients. Further, independent third party trust administration firms can assist financial planners and life underwriters in the design and implementation of charitable trust arrangements. In fact, documented studies prove that life underwriters and financial planners have been responsible for initiating billions of dollars in planned gifts over the past several decades.

Trust Officers

Most trust officers consider themselves both processors and transactors. In past years, comparatively few bank trust departments and trust companies offered charitable trust services. However, given the rise in popularity of planned giving, many banks and trust companies now have established divisions exclusively focused on planned giving.

Registered Security Representatives

The most common type of registered representative is the stockbroker. Recently, the role of the stockbroker has expanded beyond the scope of what their title alone implies. In addition to providing individual stock brokerage, larger firms offer managed account, insurance, and trusteeship services. Most financial planners and life underwriters hold securities licenses and, therefore, are registered representatives as

well; however, the ones we refer to here are those who work for an investment brokerage house. As commissioned based professionals, registered representatives have long been considered quintessential transactors and locators of planned gift prospects.

One of the greatest impediments to processing transactions and locating planned gift prospects is the potential capital gains tax that would result from repositioning otherwise underproductive or low-yielding assets. To help clients both solve this problem and capture investment assets, the brokerage industry has embraced the charitable remainder trust. From the firms' standpoint, such trusts offer long-term and conservative investment brokerage and management opportunities.

Real Estate Agents and Brokers

The federal income tax system encourages personal wealth accumulation in real property through tax incentives such as interest and depreciation deductions, certain tax credits, and the ability to exchange tax-deferred property.

Like securities professionals, real estate agents and brokers are sometimes stymied from securing a sale listing due to potentially adverse income tax consequences to the seller.

Accordingly, real estate professionals specializing in income residential, commercial, industrial, and agricultural properties make ideal PGDC members. In addition, residential agents and brokers who deal with properties that are more expensive are prime candidates.

Few advisors are as valuable as a successful realtor who knows the tools and techniques of planned giving and who has a passion for your organization. As transactors, they infrequently know much about planned giving vehicles. If you review your largest planned gifts, however, chances are that many of them were gifts of real property. What a tremendous opportunity you have to cultivate relationships with real estate professionals who can potentially bring large gifts to your organization!

Escrow and Title Officers

Escrow and title companies deal with high net worth individuals and their advisors in connection with the sale of both real estate and business interests. As advisors oriented purely in transactions, these professionals can introduce planned giving strategies to individuals who consider selling such assets.

Business Brokers

Since over \$250 billion in business acquisitions and mergers occur throughout the country each year, business brokers represent a tremendous resource for identifying planned giving prospects. A common difficulty business brokers encounter when selling a business is the double-taxation of sales proceeds. A carefully designed planned gift can mitigate this problem.

The business broker who better maintains a technical edge by knowing the tools and techniques of charitable gift planning can help clients best accomplish their planning objectives. As with real estate agents and brokers, this translates into more sales listings and completed transactions.

Tangibles Dealers, Brokers, and Auction House Hosts

One of the least understood categories of assets with respect to planned giving is tangible personal property such as artwork, manuscripts, and other collectibles. The PGDC can educate tangible asset dealers in how to make optimal planned giving choices. In addition, the PGDC also can introduce them to the larger planned giving community, which would thereby further their interests.

Do you have a major auction house such as Sotheby's or Christie's represented in your community? If so, the PGDC would benefit it and you greatly.

Appraisers

Appraisers of real property, businesses, and tangibles are very well positioned to recognize planned giving opportunities. Unlike some other advisors, such as trust, title, and escrow officers, who might not hear of a transaction until it is too late to structure alternate solutions, the appraiser's services are often called upon well in advance of a sale or transfer of property.

Because claiming a charitable contribution income tax deduction often requires a qualified independent appraisal, appraisers will be interested in what the PGDC has to say on that subject and how they can generate more business in this area.

Finding Professional Advisors

Now that we have identified the various types of professional advisors who might be interested in subscribing to the PGDC, the next question is, “How do you find them?”

The resource of choice with which we begin to search for advisors is the Internet. This is not merely a bias toward the Internet; it’s simply the easiest and most efficient way to start the task.

There is one commonality among professional advisors — many of them tend to congregate together in professional associations. Thus, rather than trying to find every individual professional advising firm, we recommend you find advisors through a professional association with which they may be affiliated. Many of these associations have established a presence on the Internet.

The following is a listing of professional advisor associations and categories with our thoughts about where you can find them.

Attorneys

Your state, county and local bar associations are good places to start looking for lawyers. Unlike some other associations, however, most bar association websites are intended for their members and, therefore, do not contain online listings of members. Instead, try the local bar association because they may know your organization. Call or email them and tell them that you are interested in providing educational opportunities for their members via the PGDC. Then ask if you can obtain a list of their members by zip code and areas of specialization. They may charge a small fee for this service.

If the bar association does not make its listing available, you might be able to obtain a membership directory from a member. However, ask if you may use the directory for commercial purposes. If you cannot obtain access to a list, ask the organization to “piggyback” a flyer regarding the PGDC with its next regular mailing to members.

Accountants

The American Institute for Certified Public Accounts (AICPA) is the premier national professional association for CPAs in the United States.

Each state has a professional association. You can see a listing by state at <http://www.aicpa.org/Advocacy/State/StateContactInfo/Pages/StateContactInformation.aspx>. Most states have local chapters that you may find on many of the state association sites.

Financial Planners

The Financial Planning Association (FPA) has a website that may include a local chapter in your community. The national website for the FPA (www.fpanet.org) provides a listing of local associations. Alternatively, you can reach the national office at 303.759.4900.

Life Underwriters

The American College sponsors the American Society of CLU & ChFC. A listing of local chapters is at www.financialpro.org/public/chap_lists.cfm.

You might also find a local chapter of The National Association of Insurance and Financial Advisors (NAIFA). Their website (www.naifa.org) allows you to find NAIFA members in your community as well as local chapter events. Their main phone number is 703.770.8100.

The Association for Advanced Life Underwriting (AALU) may be in your community. Their website (www.aalu.org) does not list local chapters, but you can reach them by phone at 1.888.275.0092. They also conduct an annual meeting in early May.

Trust Officers

Contact the trust departments of local banks, as well as trust companies in your community, by looking in the telephone directory.

The website for the American Bankers Association provides links to state Bankers Association sites as well as other links that may interest to you. The address is www.aba.com.

Another source of information is the Mortgage Bankers Association of America at www.mbaa.org. There may be a local chapter in your community.

Registered Securities Representatives

As previously mentioned, although many financial planners and life underwriters are registered reps, we refer you to larger investment houses.

Real Estate Agents and Brokers

Of all of our research, the home page of the National Association of Realtors impressed us the most. There we found the Realtor Directory, which enables searches for real estate professionals based not only by location, but also by their professional designation (of which we counted no less than 18 areas of specialization). Have some fun going through their site, which is at www.realtor.org.

Professional Designations

The following is a list of professional designations listed on the PGDC and available to members during registration. Adding their credentials allows people to better search for them in the Locate a Professional Directory. Many of these credentials were added to the PGDC at the request of the accrediting associations. The list is a valuable resource that allows our hosting organization staff to readily assess the educational background of a member.

ABAR - Accredited in Business Appraisal Review

Description: The ABAR designation is the valuation profession's only credential certifying competence in the review of business appraisal reports.

Organization: National Association of Certified Valuers and Analysts

Website: http://www.nacva.com/certifications/C_abar.asp

ACFRE - Advanced Certified Fundraising Executive

Description: The entire ACFRE program must be completed within two (2) years of the date that the ACFRE Certification Board accepts an application. A candidate may request one one-year extension to his/her "calendar" at any time during the process.

Organization: Association of Fundraising professionals

Website: <http://www.afpnet.org/Professional/ProgramDetail.cfm?ItemNumber=4054>

AEP - Accredited Estate Planner

Description: Professional estate planners can now achieve an accreditation that acknowledges their experience and specialization in estate planning.

The Accredited Estate Planner® designation is available to attorneys, Chartered Life Underwriters, Certified Public Accountants, Certified Trust and Financial Advisors, Chartered Financial Consultants, and Certified Financial Planners®.

Organization: NAPEC – National Estate Planners and Councils

Website: <http://www.naepc.org/designations/estate-planners>

AIBA - Associate of the Institute of Business Appraisers

Description: An interim designation for some who have met most of the requirements for a Certified Business Appraiser.

Organization: Institute of Business Appraisers

Website: <http://www.bizval.net/qualifications/designations.htm>

ASA – American Society of Appraisers

Description: Accreditation in the American Society of Appraisers is based on appraisal education, experience, written examinations and submission of acceptable appraisal report(s).

Organization: American Society of Appraisers

Website: <http://www.appraisers.org/Join/membership.aspx>

BVAL - Master Certified Business Appraiser

Description: Business Valuator Accredited in Litigation: First, candidates must hold a recognized business valuation credential. Then, the candidate must complete a five-day litigation workshop and pass the written examination.

Organization: Institute of Business Appraisers

Website: <http://www.bizval.net/qualifications/designations.htm>

CAP - Chartered Advisor in Philanthropy

Description: The Chartered Advisor in Philanthropy® (CAP®) provides you with the knowledge and skills needed to help clients and donors achieve their highest aspirations for self, family, and society.

Organization: American College of Financial Services

Website: <http://www.theamericancollege.edu/financial-planning/cap-philanthropy>

CASL - Chartered Advisor for Senior Living

Description: More than 76 million baby boomers are quickly moving into retirement, and they need qualified retirement planning and income advice. Other designations provide a strong foundation for a broad range of financial planning concepts, but only the CASL® designation delivers the rigor and specialized knowledge you need to be truly effective in retirement planning.

Organization: American College of Financial Services

Website: <http://www.theamericancollege.edu/financial-planning/casl-retirement-planning>

CBA – Certified Business Appraisers

Description: IBA's professional accreditation program is one of the most important components of the Institute's professional development curriculum. Members who meet established criteria are awarded the prestigious professional designation of Certified Business Appraiser (CBA). This distinction, which denotes a level of competence attained only by the most accomplished business appraisers, grants its recipient's special recognition and prestige among fellow appraisers, the courts, and throughout the business appraisal community.

Accreditation as a Certified Business Appraiser (CBA) is available to those members of The Institute of Business Appraisers who are able to demonstrate that they have attained a high level of professional competence and conduct. The CBA accreditation designates the appraiser as a true professional in his/her field, worthy of the admiration of fellow appraisers and deserving the fullest confidence of clients and potential clients.

Organization: Institute of Business Appraisers

Website: <http://www.go-iba.org/certification/certifiedbusinessappraisers.aspx>

CELA – Certified Elder Law Attorney

Description: Some attorneys have earned the designation Certified Elder Law Attorney (CELA). These attorneys have the enhanced knowledge, skills, and experience to be properly identified to the public as Certified Elder Law Attorneys. The National Elder Law Foundation (NELF) has developed and published rules and regulations regarding certification. NELF, a non-profit organization founded in 1993, is dedicated to the development and improvement of the professional competence of lawyers in the area of Elder Law.

Organization: National Association of Elder Law Attorneys

Website: http://www.naela.org/Public/About/Our_Standards/Credentials/Public/About_NAELA/Our_Standards/CELA_Certified_Elder_Law_Attorney_.aspx

CEP - Certified Environmental Professional

Description: The Certified Environmental Professional (CEP) Program began in 1979. In that first year, ten environmental professionals were awarded the CEP designation. Since

that time the CEP logo has been trademarked by the US Patent & Trademark Office, and the credential has achieved international recognition.

At its inception, the CEP Program operated under the auspices of the National Association of Environmental Professionals and the CEP credential could only be awarded to NAEP members. In 1993, after 14 years of operation, NAEP transferred the CEP program itself to a subsidiary body – The Academy of Board Certified Environmental Professionals (ABCEP), which continues to operate the program today.

Organization: National Association of Environmental Professionals

Website: <http://www.naep.org/abcep>

CFA - Chartered Financial Analyst

Description: The Chartered Financial Analyst (CFA) Program is a professional credential offered by the CFA Institute (formerly AIMR) to investment and financial professionals. A candidate who successfully completes the program and meets other professional requirements is awarded a "CFA charter" and becomes a "CFA charter holder."

CFA designation became a gold standard for the global finance industry and has been recognized in the UK as being equivalent to a master's-level degree. In the years before the financial crisis, Goldman Sachs, J.P. Morgan and other investment banks were among the employers with the largest numbers of CFA charter holders.

Organization: CFA Institute

Website: <https://www.cfainstitute.org/pages/index.aspx>

CFBS - Certified Family Business Specialist

Description: A CFBS professional is a designation held by approximately 300 financial services professionals who have completed a rigorous educational program at The American College in Bryn Mawr, Pennsylvania.

Organization: The American College

Website: <http://www.theamericancollege.edu/financial-planning>

CFP – Certified Financial Planner

Description: Today more than ever, CERTIFIED FINANCIAL PLANNER™ professionals are an essential resource. From budgeting, to planning for retirement, to saving for education, to managing your taxes and your insurance coverage, “finances” doesn’t mean just one thing for most Americans – and “financial planning” means much more than just investing. Bringing all the pieces of your financial life together is a challenging task.

Although many professionals may call themselves “financial planners,” CFP® professionals have completed extensive training and experience requirements and are held to rigorous ethical standards. They understand all the complexities of the changing financial climate and will make recommendations in your best interest.

Organization: CFP Board

Website: <http://www.cfp.net/about-cfp-board/cfp-certification-the-standard-of-excellence>

CFRE – Certified Fund Raising Executive

Description: CFRE International exists to uphold the public's trust through voluntary certification of fundraising professionals. Through the CFRE credential, CFRE International supports and encourages fundraising professionals to aspire to the highest standards of professional competence and ethical practice in serving the philanthropic sector.

Organization: CFRE

Website: <http://www.cfre.org/index.html>

ChFC – Chartered Financial Consultant

Description: A professional designation representing completion of a comprehensive course consisting of financial education, examinations and practical experience. Chartered Financial Consultant designations are granted by The American College upon completion of seven required courses and two elective courses. Those who earn the designation are understood to be knowledgeable in financial matters and to have the ability to provide sound advice.

Organization: The American College

Website: <http://www.theamericancollege.edu/financial-planning/chfc-advanced-financial-planning>

CLTC – Certified in Long-Term Care

Description: The CLTC designation is issued by NAHU to health insurance agents. The CLTC designation means that the agent is proficient in Long-Term health care insurance products and planning, including Medicare and Medicaid parts 1 and 2.

Organization: NAHU (National Association of Health Underwriters)

Website: http://www.nahu.org/education/designations/corp_ltc.cfm

CLU – Chartered Life Underwriter

Description: The Chartered Life Underwriter® (CLU®) is the world's most respected designation of insurance expertise, helping the agent gain a significant advantage in a competitive market.

This prestigious course of study helps advance an agents career by providing in-depth knowledge on the insurance needs of individuals, business owners and professional clients.

Organization: The American College

Website: <http://www.theamericancollege.edu/ads/clu>

CPA - Certified Public Accountant

Description: Certified Public Accountant (CPA) is the statutory title of qualified accountants in the United States who have passed the Uniform Certified Public Accountant Examination and have met additional state education and experience requirements for certification as a CPA.

Organization: American Institute of CPAs

Website: <http://www.aicpa.org/Pages/Default.aspx>

CPC – Certified Pension Consultant

Description: The Certified Pension Consultant (CPC) credential is conferred by ASPPA to benefit professionals working in plan administration, pension actuarial administration, insurance, and financial planning. CPCs work alongside employers to formulate, implement, administer and maintain qualified retirement plans.

Organization: ASPPA – the American Society of Pension Professionals & Actuaries

Website: <http://www.asppa.org/Main-Menu/edpubs/CertandCred/CredentialPrograms/CPC.aspx>

CPhD - Certified Philanthropic Development

Description: Certified Philanthropic Development is a professional designation awarded by the National Association of Charitable Estate Counselors. Participants must complete a course of study, examination, present a record of successful philanthropic activity and have a

commitment to pursue philanthropic counseling. Several hundred CPhDs have been awarded this designation.

Organization: National Heritage Foundation

Website: <http://www.nhf.org>

CRFA – Certified Retirement Financial Advisor

Description: The mission of the independent Certified Retirement Financial Advisor Certification Board is to provide a proctored independent exam that tests the knowledge of those individuals who are engaged in financial services covering the distribution period of retirement. Once an advisor is certified, they become a member of the Society of CRFA. The Certificate is required to obtain Continuing Education (CE) in order to ensure that they maintain their competency. The Society requires members to pledge to provide ethical objective recommendations for their clients.

Organization: Society of Certified Retirement Financial Advisor

Website: http://www.crfa.us/index.php?option=com_content&view=article&id=2&Itemid=5

CRPC - Chartered Retirement Planning Counselor

Description: Individuals who hold the CRPC® designation have completed a course of study encompassing pre-and post-retirement needs, asset management, estate planning and the entire retirement planning process using models and techniques from real client situations. Additionally, individuals must pass an end-of-course examination that tests their ability to synthesize complex concepts and apply theoretical concepts to real-life situations.

All designees have agreed to adhere to Standards of Professional Conduct and are subject to a disciplinary process. Designees renew their designation every two-years by completing 16 hours of continuing education, reaffirming adherence to the Standards of Professional Conduct and complying with self-disclosure requirements.

Organization: College for Financial Planning

Website: http://www.cffp.edu/portal/alias_rainbow/lang_en-us/tabid_3353/desktopdefault.aspx

CRPS - Chartered Retirement Plans Specialist

Description: A professional designation awarded by the College for Financial Planning to individuals who specialize in creating, implementing and maintaining retirement plans for businesses. They must pass an exam demonstrating their expertise. Successful applicants earn the right to use the CRPS designation with their names for two years, which can improve job opportunities, professional reputation and pay. Every two years, CRPS professionals must complete 16 hours of continuing education and pay a nominal fee to continue using the designation.

Organization: College for Financial Planning

Website: <http://www.cffpinfo.com/crps.html>

CSA - Certified Senior Advisor

Description: The Certified Senior Advisor (CSA) program gives you the advanced knowledge and practical tools to serve seniors at the highest level possible while giving you a powerful credential that increases your competitive advantage over other professionals.

Organization: Society of Certified Senior Advisors

Website: <http://www.csa.us>

CSPG - Certified Specialist in Planned Giving

Description: The CSPG^{CM} is a multi-module curriculum in planned giving developed by the American Institute for Philanthropic Studies under license to California State University, Long Beach Research Foundation. The curriculum encompasses the entire syllabus recommended by the Partnership for Philanthropic Planning (PPP).

The CSPG^{CM} program is the only program that offers the Certified Specialist in Planned Giving designation.

Organization: American Institute for Philanthropic Studies

Website: <http://plannedgivingedu.com/subs/certified.shtml>

CSTSA - Certified Specialist in Tax Sheltered Accounts

Description: The "Certified Specialist in Tax Sheltered Accounts" (CSTSA) consists of six self-study courses focusing on all aspects of 403(b) tax-deferred retirement plans. Tax sheltered retirement plans, governed by Internal Revenue Code Section 403(b), are available to employees of schools, churches, hospitals and other nonprofit entities. Because of the complexity of this section of the tax code, and the confusion surrounding it, the CSTSA program was developed to demonstrate a high level of knowledge about all aspects of 403(b) plans, according to NTSAA.

Organization: The National Tax Sheltered Accounts Association (NTSAA)

Website: <http://www.asppa.org/ntsaa>

CTFA - Certified Trust and Financial Advisor

Description: The qualifications for becoming a CTFA are rigorous. The designation requires a minimum of three years experience in wealth management and the completion of an ICB-approved training program. A letter of recommendation and a commitment to the ICB Code of Ethics also are required.

Organization: American Bankers Association

Website: <http://www.aba.com/Training/ICB/Pages/CTFA.aspx>

CVA – Certified Valuation Analyst

Description: The National Association of Certified Valuators and Analysts (NACVA) trains and certifies Certified Valuation Analysts (CVA) to perform business valuations as a service to both the consulting community and the users of their services. Through training and rigorous testing, CVAs demonstrate they are qualified to provide capable and professionally executed valuation services. NACVA recommends specific training as a prerequisite to certification to assure that practitioners have the knowledge and understanding necessary to perform competent services, and to assure a level of consistency and continuity in their work product. Users of valuation services benefit by having greater confidence that the service they receive is professional in quality, adheres to industry standards of practice, and meets a level of expertise the Association deems credible and worthy of one of its certified members. A primary requirement for becoming a CVA is to hold a valid license as a Certified Public Accountant.

Organization: National Association of Certified Valuators and Analysts

Website: <http://www.nacva.com>

EA – Enrolled Agent

Description: An enrolled agent is a person who has earned the privilege of representing taxpayers before the Internal Revenue Service by either passing a three-part comprehensive IRS test covering individual and business tax returns, or through experience as a former IRS employee. Enrolled agent status is the highest credential the IRS awards. Individuals who

obtain this elite status must adhere to ethical standards and complete 72 hours of continuing education courses every three years. Enrolled agents, like attorneys and certified public accountants (CPAs), have unlimited practice rights. This means they are unrestricted as to which taxpayers they can represent, what types of tax matters they can handle, and which IRS offices they can represent clients before.

Organization: IRS

Website: <http://www.irs.gov/Tax-Professionals/Enrolled-Agents/Enrolled-Agent-Information>

EPLS – Estate Planning Law Specialist

Description: Five or more years as an estate planning attorney during which at least 1/3 of the attorney's practice is devoted to estate planning, 12 or more hours of continuing legal education in estate planning topics per year for the last three years, verification of professional liability insurance coverage, recommendations from at least five colleagues that are not related to or within the same firm as the applicant.

Organization: National Association of Estate Planners & Councils

Website: <http://www.naepc.org/designations/estate-law/introduction>

FAHP – Fellow of the Association for Healthcare Philanthropy

Description: AHP's Certification Program, established in 1975, allows members to achieve professional recognition by documenting experience and testing knowledge in health care resource development. Currently, there are two levels of achievement in the program: the Certified Fundraising Executive (CFRE) and the Fellow (FAHP).

Organization: Association for Healthcare Philanthropy

Website: <http://www.ahp.org/careerdevelopment/ahp-certification/Pages/default.aspx>

FSS – Financial Services Specialist

Description: FSS candidates must complete six courses, three required and three electives. The required courses are Ethics for the Financial Services Professional, Foundations of Financial Planning: An Overview, and Foundations of Financial Planning: The Process. Advisors choose electives based on their individual practices and needs. Topics available include product education on long-term care, life insurance, annuities, disability income insurance, and business insurance. Skills-based training includes how to best meet client needs and the basics of estate planning, retirement planning, and investment planning.

Organization: The American College

Website: <http://www.theamericancollege.edu/financial-planning/fss-financial-services-basics>

J.D. - Juris Doctor

Description: The Juris Doctor (JD) degree is required to practice law in the United States. It is considered the first degree in law. The JD degree is offered by American Bar Association (ABA)-approved law schools, by law schools that are not ABA-approved, and by many Canadian law schools.

Organization: American Bar Association approved law schools

LL.B. - Bachelor of Laws

LL.M. – The Masters of Law degree

Description: The Master of Laws (LLM) degree is considered an advanced law certification that has global credibility. LLM programs offered by US and Canadian law schools are

desirable for international students who wish to gain global credentials and for JD graduates who desire advanced legal study.

Organization: American Bar Association approved law schools

MBA - Master Of Business Administration

Description: A graduate degree achieved at a university or college that provides theoretical and practical training to help graduates gain a better understanding of general business management functions. The MBA degree can have a specific focus such as accounting, finance or marketing.

MBT – Master of Business Taxation

MCBA – Master Certified Business Appraiser

Description: The Master Certified Business Appraiser is the highest professional designation awarded in the business valuation industry and recognizes the extraordinary competence of a few highly skilled and experienced individuals whose work has been widely accepted by clients and acknowledged by their most senior professional colleagues. It is a designation not commonly available except to the best-of-the-best professional appraisers and is intended to indicate to users of appraisal services that the holder has achieved a high distinction of competence in his/her profession.

Organization: Institute of Business Appraisers

Website: <http://www.go-iba.org/certification/mastercertifiedbusinessappraisers.aspx>

MST - Masters Degree in Taxation

Description: Individuals holding the MST credential have completed an advanced college degree, beyond the Bachelors Degree, specifically geared to tax law.

PFS – Personal Financial Specialist

Description: The Personal Financial Specialist (PFS) program allows CPAs to demonstrate their knowledge and expertise in personal financial planning. Whether a CPA specializes in personal financial planning with their clients or interacts with other financial planning professionals, the CPA/PFS credential adds credibility. CPA/PFS credential holders have a specific experience, education and examination requirement that sets them apart from other CPAs and financial planners.

Organization: AICPA

Website: [http://www.aicpa.org/InterestAreas/PersonalFinancialPlanning/Membership/Pages/OverviewofthePersonalFinancialSpecialist\(PFS\)Credential.aspx](http://www.aicpa.org/InterestAreas/PersonalFinancialPlanning/Membership/Pages/OverviewofthePersonalFinancialSpecialist(PFS)Credential.aspx)

Registering Professional Advisors

Registering new members to your site is a simple process.

- Place your PGDC website address on everything you can (business cards, brochures, a link from your website, etc.).
- Anyone can register for your PGDC by going to the right of the front page of your site.
- You can register for them and send them an email with their user name and password. Be sure to enter their zip code as well. They can easily change their password by clicking on My Profile at the top of the screen once they have logged in.

If you give a live presentation, we recommend you take a slightly different approach. Prepare a form that includes the information contained on the registration page of the PGDC and have advisors complete it during the meeting. Alternatively, simply ask them to write their email address and choice of password on their business card. Either way, you can then register them in the system.

The system will automatically send an email message to the advisor confirming their registration. This message provides them with a link to your PGDC site.

Review Marketing Methods following this section for additional ideas on registering your advisors.

Marketing Methods

Now that we have defined our target market, we will discuss various methods of introducing the PGDC to them.

The PGDC is amazingly easy to present to advisors. Just highlight the features and benefits and offer an opportunity to subscribe. Remember to make it as convenient as possible for people to subscribe. Sample communications are listed at the end of the marketing manual.

Press Releases

Only one thing tops advertising – free advertising! Seek out local newspapers and magazines that might be willing to include a brief announcement or article on the PGDC. Your sponsor(s) can assist you with this. Some PGDC hosting charities have succeeded in receiving front page, business section, and Sunday coverage with articles about their PGDC and what it will do for the community. Make sure to include the Internet address for your PGDC in any press release.

It is also effective to send a press release and a letter to local professional organizations and associations that publish a monthly or quarterly newsletter asking if they would include information about the PGDC in an upcoming issue. Often times they are looking for additional material that relates to their business. For ideas, see the “Finding Professional Advisors” section. See “Sample Press Release” to help you with your own press release.

Advertisements

If your marketing budget allows you to advertise, you have another very effective way to secure additional subscribers for the PGDC. Target the business section of local newspapers, local magazines, and any other publications directed toward professional advisors. Refer to the “Finding Professional Advisors” section for additional ideas. See “Sample Advertisement” as a model for your own PGDC.

Live Demonstrations

Your organization made the decision to host the PGDC only after reviewing the content of the PGDC site itself. Consequently, we believe there is no substitute for a live demonstration in front of the target audience where you have the opportunity to invite advisors to subscribe. You may conduct such a demonstration in several ways. Make sure at the end of every meeting that you capture the names of the professional advisors who attend.

Receptions

Hosting a reception on the campus or at your organization's headquarters gives you the opportunity to introduce your organization to advisors who may have no prior relationship with you. Advisors can meet your staff and, as an option, take a tour following the meeting.

You will be more successful in getting advisors to attend the meeting if you offer content they value, namely, current information. The greatest selling point of the PGDC is that it reports the most current events affecting charitable taxation. While demonstrating the site, you can visit the text of recent News Alerts and Case Studies as well as the comprehensive treatises on gift vehicles and assets in the Technical Reports section.

The invitation can inform advisors that you are going to discuss the latest trends in charitable gift planning and introduce a new Internet service that will add tremendous value to their practices. (See the "Sample Invitation", "Reservation Form", "Confirmation Form", "Reminder Call", and "Follow-up for No-shows" in the Sample Communications section.)

Office Meetings

If you cannot get the mountain to come to you, go to the mountain. Many professional advisory firms have in-house continuing education programs and are frequently looking for outside speakers. Even if they don't, the PGDC merits a special presentation with attendance requested by a senior partner. Have a meeting in the firm's conference room at lunch — and bring sandwiches. In-house meetings may even sway more attendees than other means because they may feel more comfortable to discuss specific clients who may come to mind during your presentation.

In addition, many organizations have benefited from distributing one or more articles as handouts during the meeting. This helps particularly if an online presentation is impossible.

Professional Association Meetings

The ultimate in live presentations is an invitation to speak as a guest at a professional association meeting. The local estate planning council, IAFP or American Society of CLU meetings are ideal environments for a PGDC presentation. As mentioned above, if your presentation targets the latest trends in charitable planning, you always have something to discuss because the PGDC practically writes your speech for you! Even if you have a reception and make in-office presentations, you may want to schedule one or more association meetings. Since bookings often occur several months in advance, people who have seen the PGDC beforehand still will be interested in receiving the latest news. Don't forget that if you need handouts to simply print them from the site!

If you don't feel comfortable getting involved in highly technical discussions, you might have a volunteer professional from your board, planned giving committee, or PGDC membership, join you at the podium.

Referral Networking

You might also find advisors who would be interested in the PGDC from within your own organization. Advisors to your organization itself — your law firm, accounting firm, and investment advisory firm — and advisors who represent members of your board and major donors make valuable contacts. Be sure to approach these people with an invitation to join your PGDC.

Direct Mail

If you choose to use direct mail, you should make it markedly personal. In addition to addressing each individual recipient, draft letters to advisors appropriate to their professional discipline. Make sure to include your PGDC URL in all your mailings.

We trust the ideas listed below spur your own thoughts about direct mailings:

- Create a letter from your organization targeted toward professional advisors in your community. (See “Sample Letter to Professional Advisors”)
- Create a letter from your organization targeted toward donors that support your organization, asking them to list the names of their professional advisors. (See “Sample Letter to Donors”)
- Have your donors, board members and volunteers provide you with names of advisors with whom they work. (See “Sample Solicitation Sheet”) Send a letter to these advisors stating that you are providing them with information about the PGDC at the suggestion of [name]. This letter also invites them to a reception at your organization introducing the PGDC. (See “Sample Advisor Luncheon Demonstration Invitation”)
- Have the key professional advisors who are already associated with your organization send a letter to their peers encouraging them to subscribe to the PGDC.

Professional Advisor Committees

An effective and unique way to market the PGDC to advisors in your community is to establish a PGDC Professional Advisor Committee that will organize a membership campaign. The committee members would consist of ten Internet savvy PGDC advisors in your community.

Each advisor would solicit and subscribe ten advisors from your community. Each of those ten would be asked to secure three additional advisors. Any committee member securing more than ten could receive a golf shirt or any other reward you choose.

An annual committee meeting would foster the relationships among the advisors, and you could distribute the awards at that time.

In-House Mechanisms

Always take the opportunity to print your PGDC Internet address on everything you send to advisors.

Website

You can link to your PGDC site from your organization's homepage. See "Sample Homepage Introductions" for examples.

Letterhead

You can create a letterhead showing your logo and the PGDC name for use in correspondence.

Newsletter

If your organization produces a newsletter, you may want to include a brief announcement or article about the PGDC. Not only will advisors see the announcement, but also all of your donors will see it. Your donors can then tell their advisors about it.

Email

You can send an email out to your database of advisors announcing you are now hosting the PGDC and inviting them to join. See "Sample Advisor Email Invitations" for examples.

Custom Brochures

When you meet in person with professional advisors it's helpful to give the advisor a brochure to let them know you host the PGDC. We've designed a simple brochure to explain what the Planned Giving Design Center is all about. Plus, we will customize the brochure to your organization's logo, contact information, PGDC URL and a screen shot of your branded PGDC.

Email support@pgdc.com and let us know you would like a brochure. Include any contact information you would like featured and we'll send the digital file to you for your use.

Giveaway Items

There may be times when you want to send a fun or useful item to advisors in your community as a way of introducing them to the PGDC, or you may be going to a conference and would like to give something away to attract attention.

Using the PGDC Host News

The PGDC not only provides professional advisors in your community with vital information about planned giving; it also provides them with ongoing information about your organization and helps you to maintain an active relationship with them.

Utilizing the Group News section of the PGDC is a great way to communicate with your subscribers, and it can help you build relationships with your subscribers.

Here is a list of possible news items our staff has compiled for your review:

- Gifts you have received;
- Upcoming meetings and conferences, both local and national;
- Reviews of meetings and conferences, both local and national;
- Special event notices;
- Reviews of special events;
- Local advisor resources;
- Planned giving tips;
- Speaker's Bureau – description and availability to speak at local meetings;
- New services your organization offers;
- Profile of new staff member;
- Profile of new board member;
- Profile of new donor;
- Employee of the month;
- Advisor of the month;
- Donor of the month;
- Volunteer of the month;
- Story about a grant your organization made or received;
- Complete listing of grants your organization administered in a given year;
- Status report about annual funds raised;
- Additional information included in your organization's newsletters and brochures that would apply to PGDC subscribers; and
- Any item you have released through any other media (press release, brochure, etc.).

You can also ask volunteers within your organization to write these articles for this section. For your convenience we will put up your news for you. Simply email the item to support@pgdc.com and we'll be happy to add it for you! If we know when news is posted to your home page (via RSS or email from you) we will add it to your PGDC automatically.

Let advisors know what is going on at your organization and in their community. Group News is your opportunity to allow the Planned Giving Design Center to be a marketing powerhouse for your organization.

Keep Us Informed

We ask that you would keep us informed of what your organization does to promote the PGDC in your community. Please send us a sample of company newsletters, brochures, giveaway items, or other materials that you generate. In doing so, this helps us to evaluate our program efforts nationwide more effectively.

Client Services Group

As a hosting organization, you will have exclusive access to our Client Services Group. This group is designed to provide information and resources to support our hosts and authors. Periodic newsletters are sent to group managers and administrators highlighting new features, services, customization options and much more. It offers an archive of past articles as well as an ever-expanding FAQ section for quick reference. Don't see your topic covered? Simply email support@pgdc.com.

Sample Communications

Sample Press Release

For Immediate Release

Contact: [Name]

[Date]

[Phone]

[Organization] Launches New Website for Professional Advisors

[City], ([State]) – [Organization Name] has launched a new website that is designed to provide professional advisors, such as lawyers, accountants, and financial advisors with comprehensive information on the topic of advanced charitable financial and estate planning.

The goal of the Planned Giving Design CenterSM is to enhance community awareness of planning techniques that can help people accomplish both their personal and philanthropic planning objectives by equipping their advisors with the latest information regarding the tools and techniques of charitable gift planning, and the tax laws that govern their use. The site, which allows advisors to register free of charge, is [xxxx.pgdc.com].

Sample Advertisement

Your Clients' Most Important Bookmark [xxxx.pgdc.com]

At [Organization], we aim to help legal, tax, and financial advisors design and implement their client's philanthropic financial and estate plans. Now you can receive timely and authoritative information on charitable gift planning directly from our new website – and it's FREE.

[Organization] is proud to announce the
Planned Giving Design CenterSM

The PGDC is a state-of-the-art, interactive website designed exclusively for professional advisors that:

- provides comprehensive discussions about planned giving vehicles and suitable gift assets, including how to combine them in order to accomplish a client's financial, estate, and philanthropic planning objectives and
- keeps you informed with authoritative and timely email news alerts, weekly articles, and case studies concerning planned giving and charitable taxation.

When you help your clients plan their future, you help us plan ours – a future where we can continue to [Organization Purpose].

Simply go to [xxx.pgdc.com] and register for your free subscription to this premier planning resource. For further information, contact [Contact Name] at [xxx-xxx-xxxx].

The Planned Giving Design CenterSM comes to you via the generous financial support of [Sponsor(s)].

[Sponsor Logo(s)]

Sample Reception Invitation

Charitable Gift Planning Comes to the Web!

[Organization] is pleased to announce the launch of the Planned Giving Design CenterSM – an Internet site that provides legal, tax, and financial advisors with comprehensive research and planning resources on planned giving.

On [date(s)] from [Time to Time], we will conduct a demonstration during which we will review the latest changes in tax law affecting charitable giving and how you can use the Planned Giving Design CenterSM to:

- receive timely email news alerts regarding the latest IRS pronouncements, court decisions, and legislation affecting charitable giving;
- access comprehensive treatises on the subjects of planned giving vehicles, potential gift assets, income, gift, and estate tax deduction rules, and more;
- download case studies that you can use to introduce planning concepts with clients; and
- receive weekly online articles from the nation's experts covering the full spectrum of charitable tax, financial, and estate planning.

[Month Day, Year]

[Time to Time]

[Location and Directions]

[Breakfast or Lunch] will be served

Please complete the enclosed reservation form for each attendee and return by mail or fax by [Month Day, Year].

For further information, please contact [Contact Name] at [xxx-xxx-xxxx].

Sample Reservation Form

An Introduction to the Planned Giving Design CenterSM Reservation

Please complete the following reservation information and forward it to the [Organization] office in the enclosed return envelope. Alternatively, you may fax to [xxx-xxx-xxxx]. We look forward to seeing you!

Name: _____ Title: _____

Firm Name: _____

Mailing Address: _____

City: _____ State: _____ Zip: _____

Telephone: _____ Email: _____

I would like to attend on the following date:

[Month Day, Year]

[Month Day, Year]

[Month Day, Year]

[Month Day, Year]

I cannot attend any of these dates, but I am still interested. Please contact me with additional information about the Planned Giving Design CenterSM.



Upon receipt of this form, we will send you a confirmation, including detailed directions.

Alternatively, you can make reservations by calling [Contact Name] at [xxx-xxx-xxxx].

Sample Confirmation Note

Dear [Advisor]:

We are very pleased to confirm your reservation for “An Introduction to the Planned Giving Design CenterSM” at [Organization] on [Month Day, Year]. The presentation is at [Location] and will begin promptly at [Time].

The following directions will help you find us:

[Address of Location]

From the South:

From the North:

From the East:
From the West:

We look forward to seeing you. Until then, if you need to contact us, please call [Contact Name] at [xxx-xxx-xxxx].

Sincerely,
[Name]
[Title]
[Organization]

Sample Reminder Call Script

Telephone script for a call the day before the presentation

Ask for the assistant who keeps Advisor's schedule:

"This is [Name] with [Organization]. [Advisor] is registered to attend a presentation at [Location] on [Month Day, Year] at [Time]. Will [Advisor] be attending?"

If yes: "Great! We are looking forward to seeing [him/her]."

If no: "We certainly understand that business comes first. We have scheduled additional presentations on [Dates]. Would one of these work for [him/her]?"

"Thank you."

Sample Letter for Confirmed No-Show

Dear [Advisor]:

We are sorry you were unable to attend "An Introduction to the Planned Giving Design CenterSM at [Organization] on [Month Day, Year]. It pleases me to inform you that, due to the warm reception this program is receiving, we have scheduled additional presentations on the following dates:

- [Month Day, Year]
- [Month Day, Year]
- [Month Day, Year]

I will contact you in a few days to see if we can hold a place for you on one of these dates.

Sincerely,
[Name]
[Title]
[Organization]

Sample Follow-up Phone Script to a No-Show

“Hello. This is [Name] from [Organization]. We missed you at our presentation on [Month Day, Year]. I sent you a follow-up note with some future presentation dates and am calling to see if one of those times fits with your schedule.”

If yes, then reschedule and follow-up with an additional confirmation note and reminder call.

If not, then try to obtain the advisor’s email address to send information about the PGDC.

Sample Letter to Professional Advisors

Dear [Advisor]:

As a professional advisor, you assist your clients in maintaining their financial well-being by helping them identify and analyze complex financial options and alternatives. At [Organization], we [Organization Purpose].

At [Organization], we unite our mission of [Organization Mission] with providing philanthropic opportunities that benefit our community. As with other financial decisions, many of these opportunities involve complex tax and estate planning choices.

We also understand the dynamic role that professional advisors such as you play in helping your clients evaluate and implement philanthropic plans. Consequently, we are pleased to announce the Planned Giving Design CenterSM. This premier website contains the very latest information that helps advisors counsel their clients in the area of charitable gift planning.

By using the power of the Internet, the Planned Giving Design CenterSM provides you with current, comprehensive, and fully annotated discussions regarding:

- Planned giving vehicles, such as charitable remainder trusts, charitable lead trusts, pooled income funds, charitable gift annuities, bargain sales, and bequests;*
- The suitability of prospective gift assets as well as the special issues that apply to their transfer; and*
- The rules surrounding the deductibility and compliance for charitable contributions for income, gift, and estate tax purposes.*

The PGDC also keeps you up-to-date by:

- Sending you email News Alerts with concise summaries and links to detailed commentary regarding the latest IRS pronouncements, court decisions, and legislative developments affecting charitable taxation and*
- Providing articles written by nationally acclaimed experts explaining how to apply and integrate planned giving techniques into an individual’s overall financial and estate plan.*

And finally the PGDC:

- Helps you communicate planned giving opportunities with clients by providing planning-objective-specific case studies and computer illustrations that you can fit to your clients' specific needs and circumstances and
- Assists you in implementing planned gifts by providing you with sample gift documents, checklists, and administrative resources.

All information on the PGDC comes from nationally recognized legal, tax, and planned giving experts who dedicate themselves to making the PGDC the most comprehensive information resource on planned giving available.

We are also pleased to announce that [Sponsor(s)] has underwritten the entire cost of the PGDC as a community service; therefore, all PGDC content is available to you free of charge! It is our goal that, by partnering with you, we would meet individuals whom you think may consider our organization worthy of their charitable support.

We now invite you to go online and review the PGDC at [xxxx.pgdc.com]. Once there, you will have an opportunity to take a quick tour, after which we invite you to complete the online registration form and become a member of the Planned Giving Design CenterSM team! There is absolutely no obligation on your part.

If I can assist you any further, please contact me at [xxx-xxx-xxxx] or [Email Address]. We look forward to collaborating with you for a better community.

Sincerely,
[Name]
[Title]
[Organization]

Sample Letter to Donors

Dear [Donor]:

Wouldn't it be great if the professional advisors you depend to help you structure your charitable gifts had an easy way to access up-to-date, high quality, planned giving content that could help them better advise you of sophisticated giving options and other planned giving techniques?

Here at [Organization], we deal with charitable gift plans every day. Your professional advisors, however, may not. That's why we have created a new Internet-based information resource: the Planned Giving Design CenterSM. With news alerts about the latest developments in the planned giving field and in-depth information about particular planning strategies, this service provides financial professionals in our area with the information they need to give you the best possible advice regarding gift plans. And best of all, it's free!

If you know of an attorney, CPA, trust officer, insurance agent, or any other financial services professional who might benefit from the Planned Giving Design CenterSM, we would be glad to add them to our subscriber list. Simply provide as much information

as you can on the enclosed form and mail or fax it back to my attention. We think your advisors will appreciate this complimentary service, and it will give us the opportunity to spread the word about various gift plans that help [Organization] to [Organization Mission].

Thank you in advance for your assistance.

Sincerely,
[Name],
[Title]
[Organization]

P.S. If you enjoy reading about planned giving strategies that are more technical in nature, you also may wish to join the PGDC network of articles. To do so, merely visit our site at [xxxx.pgdc.com] and click "Join Today for Free" in the upper right-hand corner.

Sample Solicitation Sheet

[Organization Name]

Solicitation of Prospective Planned Giving Design CenterSM Subscribers

Please fax or mail this completed form to:

[Address]

[City, State Zip+Four]

Fax: [xxx-xxx-xxxx]

Name: _____

Discipline (i.e. attorney, CPA, etc.): _____

Address: _____

Phone: _____ Email Address: _____

Name: _____

Discipline (i.e. attorney, CPA, etc.): _____

Address: _____

Phone: _____ Email Address: _____

Name: _____

Discipline (i.e. attorney, CPA, etc.): _____

Address: _____

Phone: _____ Email Address: _____

Name: _____

Discipline (i.e. attorney, CPA, etc.): _____

Address: _____

Phone: _____ Email Address: _____

Name: _____

Discipline (i.e. attorney, CPA, etc.): _____

Address: _____

Phone: _____ Email Address: _____

Name: _____

Discipline (i.e. attorney, CPA, etc.): _____

Address: _____

Phone: _____ Email Address: _____

Submitted by: _____

Address: _____

Phone: _____ **Email Address:** _____

Sample Advisor Luncheon Demonstration Invitation

Dear [Advisor]:

This year, Americans will give over \$300 billion to charity. To place this amount in perspective that equates to over \$1,141,000 during the two minutes it will take you to read this letter. America is a generous nation.

At [Organization], we believe that charitable gift planning is truly a team effort. Given the complexity of gift planning vehicles and how they interact with a donor's tax, financial, and estate planning, properly implemented planned gifts require the involvement and coordination of the donor's legal, tax, and financial advisors.

The rules and techniques of charitable gift planning are inherently complex. Furthermore, practitioners can conveniently and economically access only a few educational resources to help them understand all of the available options. How, then, do advisors stay abreast of the dynamic landscape of charitable taxation and gift planning?

[Organization] is very pleased to announce the creation of the Planned Giving Design CenterSM (PGDC) – a premier Internet website created to provide members of the legal, tax, and financial services communities with the very latest information on charitable gift planning.

By using the power of the Internet, the Planned Giving Design CenterSM provides you with current, comprehensive, and fully annotated discussions regarding:

- *Planned giving vehicles such as charitable remainder trusts, charitable lead trusts, pooled income funds, charitable gift annuities, life estate agreements, and bargain sales;*
- *The suitability of prospective gift assets, and the special issues that apply to their transfer; and*
- *The rules surrounding the deductibility and compliance for charitable contributions for income, gift, and estate tax purposes.*
- *The PGDC also keeps you up-to-date by:*
- *Sending you email News Alerts with concise summaries that link you to detailed commentary regarding the latest IRS pronouncements, court decisions, and legislative developments affecting charitable taxation and*
- *Providing articles written by nationally acclaimed experts on how to apply and integrate of planned giving techniques into an individual's overall financial and estate plan.*
- *And finally, the PGDC:*
- *Helps you communicate planned giving opportunities with clients by providing planning-objective-specific case studies that you can use to introduce planning concepts to clients and*
- *Helps you implement planned gifts by providing you with sample gift documents, checklists, and administrative resources.*

The best news is that all of these resources come to you completely free of charge!

A Special Invitation

We cordially invited you to attend a special luncheon during which we will take you on a tour of the Planned Giving Design CenterSM, showing you all of the resources that can help you add value to the advice you provide your clients. We will also update you on latest changes affecting charitable taxation and review several case studies that you can put to work in your practice immediately.

A reservation form that provides several dates from which to choose accompanies this letter. Simply select a date and return the form using the enclosed envelope, or you may fax it to [xxx.xxx.xxxx]. We will send you a confirmation along with detailed directions.

Thank you for this opportunity to serve you. We look forward to seeing you soon.

With kind regards,

[Name]

[Title]

[Organization]

Sample Homepage Introductions

Sample #1

The Planned Giving Design Center is a national network of hosting organizations that proudly provide more than 30,000 members with timely, objective content on the subjects of charitable taxation and planned giving. PGDC features an interactive repository of the latest news stories, feature articles, technical reports, case studies, calculators, presentations, rates and tables, sample forms, and discussion forums, all geared for the professional advisor community. This is a free online resource that we offer our professional advisors!

Click [\[here\]](#) to visit PGDC!

Sample #2

We are pleased to provide you the Planned Giving Design Center, a free online service with tools to help you advise your clients about the benefits of charitable giving. It features:

- *Presentations and Charitable Calculator, an interactive calculator that assists you in determining the tax benefits of charitable gifts;*
- *news alerts with concise summaries of the regarding the latest IRS pronouncements, court decisions and legislative developments affecting charitable taxation;*
- *detailed commentaries on rulings, decisions and legislation; and*
- *articles by nationally acclaimed experts about integrating planned giving techniques into a client's overall financial and estate plans.*

Register for this free service today.

Already a subscriber to the Planned Giving Design Center? Login to PGDC [\[here\]](#).

Sample #3

As [ORGANIZATION] partners with professional advisors and serves as a trusted philanthropic partner, we're pleased to provide advisors with helpful resources, including access to the Planned Giving Design Center. This national online service offers timely information and assistance for legal, tax and financial professionals who develop philanthropic, financial and estate plans for their clients.

The Planned Giving Design Center can be accessed by registering once at [\[URL\]](#). Subscribers can opt to receive e-mail news alerts, articles by nationally recognized tax and estate planning experts, and case studies on the tax benefits of charitable planned giving. In addition, sample fund agreements and a philanthropic gift calculator are available at the site.

See more at: [\[xxx.pgdc.com\]](#)

Sample #4

Advisors can sign up for a complimentary membership to the Planned Giving Design Center, an informational resource on charitable giving law for professional advisors. The site offers authoritative, current information on charitable gift planning through:

- News alerts to keep you up to date with concise summaries of IRS pronouncements, court decisions, legislative activity, and other information regarding charitable gift planning;
- Presentations and charitable calculator that allows advisors to easily calculate the tax impact of a deferred gift. The calculation system is designed to help gift planning advisors calculate the exact amount of a charitable contribution deduction.
- Search function to give advisors access to numerous court rulings and private letter rulings; and much more!

Visit the Planned Giving Design Center and start taking advantage of all the benefits that it has to offer.

Sample #5

We have developed some unique resources for professional advisors. The Planned Giving Design Center has been helping charitable organizations and for-profit philanthropic service providers cultivate relationships with professional advisors by providing the largest body of content, commentary and planning tools dedicated solely to the topic of charitable gift and estate planning and provides the latest ruling and tax information from the Federal Government. [Join](#) the email list today!

Sample Advisor Email Invitations

Email Invite Sample #1

[Organization Name] is honored to count you among our network of professional advisors and nonprofit representatives, and we are pleased to provide the Planned Giving Design Center (PGDC). We seek to support you with this FREE online service to further assist you as you advise your clients and donors about estate planning and charitable giving. We invite you to [join the PGDC](#).

As a member of the PGDC community, you will receive a weekly e-newsletter providing you with the most current news, research, forums and other resources. You can also run calculations and presentations in the [calculation center](#).

If you would like to discuss charitable giving opportunities or learn more about how planned giving supports the mission of [Organization], please contact [Name] at [Email], or [Phone] or visit [Homepage].

We hope you enjoy all the benefits of being a member of the PGDC!

Email Invite Sample #2

[Organization Name] now offers an online resource that is designed to provide professional advisors, such as yourself with comprehensive information on the topic of advanced charitable, financial and estate planning.

The goal of the Planned Giving Design Center is to enhance community awareness of planning techniques that can help people accomplish both their personal and philanthropic planning objectives by equipping their advisors with the latest information regarding the tools and techniques of charitable gift planning, and the tax laws that govern their use. The site, which allows advisors to register free of charge, is [\[xxx.pgdc.com\]](#).

Email Invite Sample #3

At [Organization], we aim to help legal, tax, and financial advisors design and implement their client's philanthropic financial and estate plans. Now you can receive timely and authoritative information on charitable gift planning directly from our new website — and it's FREE.

The PGDC is a state-of-the-art, interactive website designed exclusively for professional advisors that:

- *provides comprehensive discussions about planned giving vehicles and suitable gift assets, including how to combine them in order to accomplish a client's financial, estate, and philanthropic planning objectives and*
- *keeps you informed with authoritative and timely email news alerts, weekly articles, and case studies concerning planned giving and charitable taxation.*
- *calculations and presentations that you can customize to fit your clients' specific needs and circumstances*

When you help your clients plan their future, you help us plan ours — a future where we can continue to [Organization Purpose].

Simply go to [\[xxx.pgdc.com\]](#) and register for your free subscription to this premier planning resource. For further information, contact [Contact Name] at [Phone] or [Email].

Click [here](#) to join today for FREE. We hope you enjoy all the benefits of being a member of the PGDC!

Email Invite Sample #4

As a professional advisor, you assist your clients in maintaining their financial well-being by helping them identify and analyze complex financial options and alternatives.

At [Organization], we unite our mission of [Organization Mission] with providing philanthropic opportunities that benefit our community. As with other financial decisions, many of these opportunities involve complex tax and estate planning choices.

Marketing Your Planned Giving Design Center

We also understand the dynamic role that professional advisors such as you play in helping your clients evaluate and implement philanthropic plans. Consequently, we are pleased to announce the Planned Giving Design Center. This premier website contains the very latest information that helps advisors counsel their clients in the area of charitable gift planning.

By using the power of the Internet, the Planned Giving Design Center provides you with current, comprehensive, and fully annotated discussions regarding:

- *Planned giving vehicles, such as charitable remainder trusts, charitable lead trusts, pooled income funds, charitable gift annuities, bargain sales, and bequests;*
- *The suitability of prospective gift assets as well as the special issues that apply to their transfer; and*
- *The rules surrounding the deductibility and compliance for charitable contributions for income, gift, and estate tax purposes.*

The PGDC also keeps you up-to-date by:

- *Sending you email News Alerts with concise summaries and links to detailed commentary regarding the latest IRS pronouncements, court decisions, and legislative developments affecting charitable taxation and*
- *Providing articles written by nationally acclaimed experts explaining how to apply and integrate planned giving techniques into an individual's overall financial and estate plan.*

And finally the PGDC:

- *Helps you communicate planned giving opportunities with clients by providing planning-objective-specific case studies along with calculations and presentations that you can fit to your clients' specific needs and circumstances and*
- *Assists you in implementing planned gifts by providing you with sample gift documents, checklists, and administrative resources.*

All information on the PGDC comes from nationally recognized legal, tax, and planned giving experts who dedicate themselves to making the PGDC the most comprehensive information resource on planned giving available.

We now invite you to go online and review the PGDC at xxxx.pgdc.com. Once there, take a look around, after which we invite you to complete the online registration form and become a member of the Planned Giving Design Center community! There is absolutely no obligation on your part.

If I can assist you any further, please contact me at [Phone] or [Email Address]. We look forward to collaborating with you for a better community.