



*Smart planning and inspired giving
for a better world.*

Consulting ♦ Training ♦ Strategizing

Helping you help others make a difference.

Fundamentals of Planned Giving

~Slide 1 - Title~

Develop a better understanding of gift planning vehicles - when and how to use, benefits, and pitfalls; and why charitable intent is an important part of planning.

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~Slide 2 - Take Aways~

Learning Objectives (Key Take Aways) - What you will learn about using planned giving to help clients achieve their goals:

1. The **advisor is the guide** who helps the client in the process of discovery - Values Based Planning - and shows her how she can achieve her goals, her vision, especially as concerns charitable intent
2. Understand current versus deferred gifts, including examples of each
3. Appreciate the advantage of giving non-cash assets
4. Learn the advantages of and differences between various planned giving vehicles, including outright and split interest gifts

Presentation:

~Slide 3 - First Fundamental~

I. First Fundamental - You are the Guide; the Client is the Hero

~Slide 4 - Hero~

True success is helping your client become the hero in her own story (estate plan).

~Slide 5 - Guide Yoda~

Donald Miller in *Building a StoryBrand: Clarify Your Message So Customers Will Listen*, HarperCollins Leadership, 2017, lays out the framework that sets you up for this success when you assume the role of guide and you treat your customer, or client, as the hero.