



BUILDING YOUR RESOURCES



The prior sections of this toolkit focused on bringing your organization into readiness for a planned giving program. If there is one takeaway that we would like you to understand as we conclude, it is this:

Don't worry. There are always professional people available to help you with complex gifts or general questions.

A second point would be that you don't have to be an expert in all areas, but do your best to broaden your knowledge. Many organizations fail to create a planned giving program because they feel that they lack professional expertise to manage it. As planned gifts are often more substantial than annual gifts, it is often well worth the expense to engage with professional counsel when needed. But, you also needn't be an expert in all areas of planned giving to grow a program in your organization.

Professional Development & Skill Building

In reading this toolkit, you are already taking the critical step of building your own knowledge in planned giving. Congratulations!

We have developed a [Resource List](#) to provide you with links to resources that will help you further your understanding of planned giving. This includes:

- **Books:** A curated reading list to help build your own expertise in planned giving. This includes not only books that provide technical expertise but also books that will help you better understand donor psychology, financial systems, and philanthropy – all essential in a well-rounded planned giving program.
- **Philanthropy-specific organizations:** Links to some organizations that provide counsel to donors on specific areas of fundraising, including engaging younger generations, grantmaking and social justice.
- **Professional organizations:** Links to organizations that promote education, ethics, and networking for professional advisors and planned giving professionals.
- **Helpful guides:** Links to best practices guides for planned giving.
- **Tools:** Aggregated information and technical resources for planned giving.
- **Planned giving marketing vendors:** Links to organizations that provide planned giving expertise and/or marketing services. These vendors are often accommodating in providing gift calculators, glossaries, and information on emerging issues.





RESOURCE LIST

Articles:

- [Professional Advisors and Nonprofits – A Collaboration](#)
- [Identifying Professional Relationships that Make a Difference](#), Kathryn W. Miree
- [Brain Scan Study Gives Fresh Insight into Charitable Giving Behavior](#), Rosen
- [Charitable Gifts of Noncash Assets](#), Bryan Clontz

Recommended Books:

For Non-Profits

- [Planned Giving in a Nutshell](#), Craig C. Wruck
- [Planned Giving Essentials: A Step by Step Guide to Success](#), Richard D. Barrett
- [The Complete Guide to Planned Giving](#), Debra Ashton
- [Nonprofit Essentials: Endowment Building](#), Diana S. Newman
- [Donor-Centered Planned Gift Marketing](#), Michael J. Rosen
- [The Seven Faces of Philanthropy](#), Russ Prince, Karen File
- [The Charitable Handbook](#), The National Underwriter

For Individuals

- [The Golden Ghetto](#), Jessie O'Neill
- [The Hidden Gifts of Helping](#), Stephen Post
- [Philanthropy, Heirs and Values](#), Williams and Pressler
- [The Price of Privilege](#), Madeline Levine
- [Raising Financially Fit Kids](#), Jolene Godfrey
- [Giving, Philanthropy for Everyone](#), Esperti, Petterson, Zeeb
- [Inspired Philanthropy: A Step by Step Guide to Creating a Giving Plan and Leaving a Legacy](#), Tracy Gary
- [Six-Word Lessons to Build a Sustainable Legacy](#), Tom Fowler

Training Resources:

- Videos, Articles and Books List by Russell James

Programs & Organizations:

- 21/64 (resources to engage the next generation) <https://2164.net>
- American Council on Gift Annuities www.acga-web.org
- The American College Chartered Advisor in Philanthropy (CAP)[®] Program www.theamericancollege.edu/designations-degrees/CAP
- Association of Fundraising Professionals Advancement Northwest and the International Association of Fundraising Professionals www.afpadvancementnw.org www.afpglobal.org
- Donor Search www.donorsearch.net/planned-gifts-complete-guide
- Estate Planning Council of Seattle www.epcseattle.org
- Free Will - www.freewill.com
- Leave 10 - www.Leave10.org
- Moonjar - www.moonjar.com
- National Association of Charitable Gift Planners <https://charitablegiftplanners.org>
- National Council of Nonprofits www.councilofnonprofits.org
- Nonprofit Library - <https://nonprofitlibrary.com>
- Philanthropy Northwest www.philanthropynw.org
- Planned Giving.com <https://plannedgiving.com/about-us/what-is-planned-giving>
- Slide Share <https://www.slideshare.net/rnja8c/talking-planned-giving-words-that-work>
- Social Justice Fund - www.socialjusticefund.org
- Sound Philanthropy www.soundphilanthropy.com
- South Sound Planned Giving Council www.sspgcouncil.org
- Tacoma Estate Planning Council www.tacomaestateplanning.org
- The Fundraising Authority www.thefundraisingauthority.com/planned-giving
- Washington Planned Giving Council www.wpgc.org





Community Foundations:

Community foundations are public charities that encourage and facilitate impactful philanthropy in our local communities and beyond. Many community foundations can assist nonprofits with the acceptance and administration of different types of planned gifts, including charitable gift annuities, charitable trusts, and retained life estates, as well as manage endowments. Most community foundations have planned giving experts on staff and robust planned giving websites and related resources.

Local community foundations:

- Bainbridge Community Foundation
www.bainbridgecf.org
- Community Foundation of Snohomish County
www.cf-sc.org
- Community Foundation of South Puget Sound
www.thecommunityfoundation.com
- Greater Tacoma Community Foundation
www.gtcf.org
- Kitsap Community Foundation
www.kitsapfoundation.org
- The Seattle Foundation
www.seattlefoundation.org

Planned Giving Marketing, Software & Consulting Resources:

- Crescendo Interactive
www.crescendointeractive.com
- PG Calc
www.pgcalc.com
- PlannedGiving.com
www.plannedgiving.com
- Planned Giving Design Center
www.pgdc.com
- The Stelter Company
www.Stelter.com
- LILTdesign.com
www.liltdesign.com
- Thompson & Associates
www.ceplan.com

Local Estate Planning Councils:

- Estate Planning Council of Seattle
www.epcseattle.org
- Tacoma Estate Planning Council
www.tacomaestateplanning.org
- Snohomish County Estate Planning Council
www.scepc.org

