

Where Can you Find Technical Assistance for Planned Gifts?

Even seasoned development professionals can be intimidated by planned gifts, especially when it comes to the technical aspects of a gift. For those who are motivated, there are several ways to secure planned gift assistance.

1. Your own professional growth

Much of planned gift work can be self-taught. Your regular reading, educational opportunities, and experiences can help you grow in the more technical aspects of planned gifts.

2. Subscription services

There are services available that will provide you with technical assistance in print, on-line, and over the phone.

3. Journals

The Journal of Gift Planning, published by the National Committee on Planned Giving, is the leader in the field. Other fundraising trade journals also produce articles on planned gifts. Keep the articles you find helpful and build a file of different topics.

4. Agents of influence

Recruit a group of volunteers who can serve as your Planned Gifts Committee. They will be able to help you from time to time with your technical questions or refer you to others who can help.

5. Networking

Make connections with others who know about planned gifts. Many professionals are willing to help you fill in the gaps in your knowledge.

6. Counsel

This can take the form of fundraising counsel, legal counsel, or financial counsel. Counsel can be used on a retained basis or on an as-needed basis.

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