



The 23rd Annual

Planned Giving CONFERENCE

presented by the **Northern California Planned Giving Council**
in association with Colonial Consulting, LLC

CULTIVATION / STEWARDSHIP / MARKETING TRACK

Session 1: 9:30 am - 10:45 am

Topic:

**The 8 Ways to Ask for Gifts:
Expanding the Art and Science of the Solicitation**

Presented by:

Lani Starkey, JD, LLM, CPA

Workshop Summary:

Many people have modest training or limited on the job experience with asking for major/planned gifts. And if they do have extensive training or on the job experience, it is almost always in the form of “The Way.” “The Way” is the tried and true method of discovering and cultivating a prospect, aligning a strategic ask with a well-designed charitable purpose or program, and then having the right person with the right relationship make the ask in the right way.

While “The Way” is the gold standard, it has some severe limitations and drawbacks. Thus, in order to be a successful fundraiser, hit your required metrics, and produce more results with less resources, you must be more creative and more flexible with your ask strategies. Thus, I have developed 8 on the job, gift producing, proven methods of asking for gifts. Some of these you may do now but not be aware of it. Others you might never have even considered. Together, in conjunction with The Way, it gives me an arsenal of options to do my job better, faster, and with more results. This session will delve into the 8 ways and analyze numerous case studies.

Workshop Presenter



Lani Starkey, JD, LLM, CPA, a tax attorney and accountant, is Associate Vice President, Principal Gifts and Estate and Gift Planning. A nationally recognized charitable tax planning expert, Lani frequently speaks at national, regional, and local conferences, and has authored articles in respected journals, newspapers, and newsletters. Lani is also an Adjunct Professor at the Shidler College of Business at the University of Hawai'i at Mānoa.

Lani received his LL.M. in Tax from the University of Florida's Graduate Tax Program. He earned his J.D. cum laude from Pepperdine University School of Law, and his B.B.A. in Accounting from Texas State University. Fortunately, Lani passed both the Bar and CPA exam on his first attempt.

Prior to joining the Foundation, Lani was Vice President and a Staff Attorney at Crescendo Interactive, Inc., a Southern California for-profit corporation. His responsibilities included teaching and speaking at over 30 tax seminars and conferences each year, consulting with nonprofits and professional advisors nationwide, and researching and writing tax articles.

Lani's legal experience derives from both the private and public sector. After clerking for a large Texas gas corporation, he was a judicial intern for the United States Court of Appeals for the Ninth Circuit for the Honorable Stephen Reinhardt and the Los Angeles County Superior Court for the Honorable Robert M. Letteau.

Lani has strong ties to Hawai'i and the University of Hawai'i. Lani spent part of his childhood growing up on the Kohala Coast of the Big Island. Lani's father earned a master's degree and a Ph.D. from UH Mānoa, and his sister earned a bachelor's degree from UH Mānoa. In addition, Lani's father is an Adjunct Professor at the University of Hawai'i Center in West Hawai'i. Prior to moving to Hawai'i, Lani was a longtime resident of Houston, Texas, and Malibu, California, where he was an avid triathlete and surfer.

Lani is a member of the University of Hawai'i Foundation's Heritage Society and President's Club. Lani is also a member of the State Bar of California, Hawai'i Society of CPAs, Hawai'i Estate Planning Council, Financial Planner's Association of Hawai'i, and the Partnership for Philanthropic Planning.

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