



The 23rd Annual

# Planned Giving CONFERENCE

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

## **FUNDAMENTALS TRACK**

**Session 4: 3:45 PM – 5:00 PM**

### **Topic:**

**What Else Do I Need to Know About Planned Giving?**

### **Presented by:**

**Aviva Shiff Boedecker, JD**

### **Workshop Summary:**

A fast-paced overview of a broad variety of issues and situations that planned giving officers are likely to encounter. Participants will become better-prepared to keep the gifts they get, work with committees, develop useful policies, avoid potentially disastrous gifts, work effectively with advisors, tame donor imagination, use resources efficiently and more. Bring the questions and situations you've been wondering about.

## Workshop Panelist



**Aviva Shiff Boedecker** is a Senior Consultant with The Sharpe Group. In her 30 years as a gift planner she has served as Director of Gift Planning for the Marin Community Foundation, Director of Planned Giving at the University of California, Berkeley, and started San Francisco Ballet's planned giving program. She was previously in the private practice of law.

Aviva is a past President and, after a ten-year break, again a board member of the Northern California Planned Giving Council, has served on the board of the Partnership for Philanthropic Planning, and is a past President of the Marin County Estate Planning Council. She has been a member of Planned Giving Today's Editorial Advisory Board, writes for many planned giving publications, and is a frequent lecturer on planned giving.

Aviva has been involved with a variety of other non-profit and community organizations, and is a Big Sister for Big Brothers, Big Sisters. She is an alumna of the University of California, Berkeley and the University of California, Hastings College of the Law, and a member of the California Bar.

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## What Else Do I Need To Know?

(about planned giving)



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## Things to Think About

### Donor Intent

#### Learn about your donor's plans

- ✓ Gift purpose compatible with needs?
  - » Imaginative donors
- ✓ Amount sufficient for purpose?
- ✓ Plan B

## Things to Think About

### Gift acceptance policies

- ✓ What do they say?
- ✓ Where are they?
- ✓ Who knows about them?
- ✓ Who has authority to accept certain gifts?

### Other policies

- ✓ Real estate
- ✓ Use of undesignated bequests

## Things to Look Out For

### Real Estate

- ⊠ Property the donor can't sell
- ⊠ Toxic waste dumps
- ⊠ Remote or low value property
- ⊠ Tenants
- ⊠ Donors who want to stay in control
- ⊠ Being too quick to say NO

## Things to Look Out For

### Insurance proposals

- Desirable insurance gifts
- Challenging insurance gifts

## Things to Look Out For

### Stuff (tangible personal property)

- Is it a good gift for the organization?
- Is it a good gift for the donor?
- Form 8283
- Form 8282

## Things to Look Out For

### Beneficiary Designation Gifts

- This is where you really NEED documentation
- How to collect
- What can go wrong

## Practicalities

### Planned Giving Committees

Do you need a committee?

- Define the purpose
- Membership
- Activities
- Benefits/recognition

## Practicalities

### Time Frame for Realizing Gifts

- Some things you can't control
- What you can control

## Practicalities

### Finding Donors

- Donor demographics
- Your best prospects
- 100% Board participation?

## Practicalities

### Working with the 1%

- They usually have their own advisors
- Probably don't need income for themselves
  - May be interested in providing income for others
- Some not able to make testamentary gifts

## Relationships

### Working with other fundraisers

- Integrating major and planned gifts
- Dealing with competing priorities
- Coordinating cultivation
- Gift credit
- Coordinating stewardship



## Relationships

### Working with Donors' Advisors

- What to expect
- What can go wrong
- What they want from you
- What can go right

## Collecting the Money

- Keep the Gifts You Get
  - Understanding letters from attorneys
  - Rights of charitable organizations
  - How will it look in the newspaper?

## Outsourcing

- What you can outsource
- What not to outsource

## QUESTIONS?

**THANK YOU!**



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