

Planned Giving

Bibliography

Library!

BOOKS

The Complete Guide to Planned Giving

Debra Ashton

FIC 361.7068 ASHTON

Practical information about the development, operation, tax consequences and necessary resources.

How to Build a Big Endowment

Public Management Institute

FIC R 361.7068 HOW TO

Discusses the building of a simplified deferred giving program and explains the organization of trust and annuity programs.

How to Rate Your Development Office

Robert J. Berendt and J. Richard Taft

FIC 361.7068 BERENDT

Written for the CEO of an organization, discusses the mechanics of building a sound development program, including planned giving.

An Introduction to Planned Giving

Debra L. Thorburn

FIC OV 361.7068 INTRODU

Fundraising through bequests, trusts, gift annuities and life insurance.

Planned Giving: For the One Person Office

David G. Schmeling

FIC R 361.7068 SCHMELI

Designed to assist the staff of a small development office build an effective planned giving component.

Planned Giving: Management, Marketing and Law

Ronald R. Jordan, Katelyn L. Quinn and Carolyn M. Osteen

FIC R 658.153 JORDAN

Written from a legal perspective, it includes sample documents for use in creating and administering a planned giving program.

Where the Money Is: A Fundraiser's Guide to the Rich

Helen Bergan

FIC 361.7 BERGAN

FIC R 361.7 BERGAN

A guide for fundraisers to help find biographical information about wealthy and prominent individuals.

VIDEOS

Cultivating and Soliciting Major Donors

Henry Goldstein, NSFRE

FIC VIDEO 361.7097 CULTIVA

Video that discusses the identification, cultivation, and solicitation of major donors.

INTERNET

» Partnership for Philanthropic Planning (formerly the National Committee on Planned Giving) <http://www.pppnet.org/>

» Planned Giving Design Center <http://www.pgdc.com/>



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