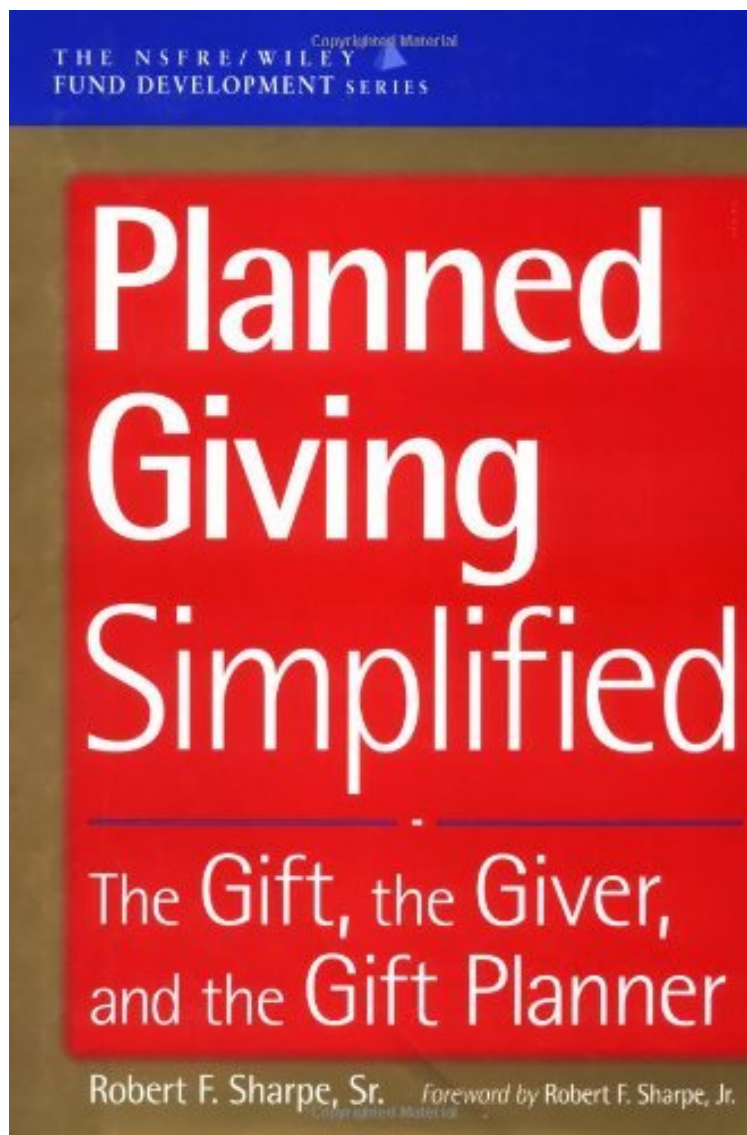


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## **Planned Giving Simplified: The Gift, The Giver, and the Gift Planner (The AFP/Wiley Fund Development Series)**

*Robert F. Sharpe*

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**Robert F. Sharpe : Planned Giving Simplified: The Gift, The Giver, and the Gift Planner (The AFP/Wiley Fund Development Series)** before purchasing it in order to gage whether or not it would be worth my time, and all praised Planned Giving Simplified: The Gift, The Giver, and the Gift Planner (The AFP/Wiley Fund Development Series):

1 of 1 people found the following review helpful. Donor-Centric Planned GivingBy Buzz H.This isn't a "how" book.

It's a "why" book. I've seen quite a few dreadful planned giving books that have no respect for donors at all. This book explains WHY people want to make planned gifts. And it is, as all fundraising should be, donor-centric. If a development person has read and understood the material in Sharpe's book, planned giving can become a pleasure for the donor and the solicitor. Learning about the various legal and financial vehicles of planned giving in great detail is, frankly, easy. This book deals with the challenging (and rewarding) parts. I recommend it. 0 of 0 people found the following review helpful. Three Stars By CharNew Very dry reading... author takes WAY too many words to say something. 18 of 18 people found the following review helpful. Planned Giving 101 By A Customer This is an excellent primer on planned giving. The author provides definitions and examples of many useful terms in an easy-to-read format. The examples clarify the different options available and the benefits of each. The emphasis on planned giving as a GIFT to charitable institutions is refreshing in a field that talks often of tax advantages. Mr. Sharpe highlights the human side of planned giving, noting the importance of establishing a relationship with donors, and acknowledging gifts. As a former life insurance salesperson, the author is somewhat biased in favor of life insurance products, However, he does provide numerous illustrations of all types and realistic scenarios, as well as a wealth of experience. The format is clear, and topics are covered well and methodically. Mr. Sharpe's organization of subjects makes this an ideal primer - think of it as a textbook for Planned Giving 101. This is a good source for the professional or organization just starting to consider planned giving, and a wonderful reference for those with more experience.

Planned Giving Simplified A down-to-earth introduction to planned giving by a leading pioneer in the field. In this groundbreaking book, charitable gift planning expert Robert F. Sharpe, Sr., demystifies the complex world of planned giving for not-for-profit managers. He provides a detailed blueprint for starting and building a successful planned giving program, and develops a rational framework for managing the subtle interplay of legal, administrative, and interpersonal factors involved in the planned giving process. Central to Sharpe's proven approach is his controversial definition of the effective charitable gift planner as being not so much a fund raiser as an expert at helping potential benefactors satisfy a deeply felt emotional need. Rather than soliciting or closing on planned gifts, the planner's primary focus should be on forming relationships with donors and providing them with the means and opportunity to fulfill their desire to do good. Using compelling case studies, Sharpe demonstrates his approach in action. He identifies the various types of planned gifts and takes you inside the hearts and minds of the planned givers themselves, revealing their primary motivations and overarching concerns. He then guides you, step-by-step, through the entire planned giving process, and concludes with a clear delineation of the organizational structures required to sustain a planned giving program. Praise for Planned Giving Simplified "This book is a must for all who are serious about establishing or maintaining a successful gift planning program for their institution." --Nancy L. Perazelli, CFRE Gift Planning Officer, Drake University, Des Moines, Iowa. "In his own inimitable style, Bob Sharpe has done an admirable job of describing the planned giving process in an easy-to-understand manner. Woven throughout is the emphasis on the important human relationship between the donor and the charitable gift planner." --Walter T. Weaver, III Director, Finance Support Division, Boy Scouts of America. "Robert F. Sharpe, Sr., has provided a comprehensive road map of the world of planned giving. He guides [readers] to the desired destination without unnecessary detours along the way. His book will be a valuable addition to the libraries of not only not-for-profit professionals, but also 'givers' who seek a better understanding of the many routes available to them in their gift planning." --Joseph H. Powell President Emeritus and Senior Consultant, Baptist Memorial Health Care Corporation. "The name Bob Sharpe is synonymous with planned giving. I don't know of anybody who knows more about it and who can better convey its importance." --Reverend Dr. Arthur Caliandro Pastor, Marble Collegiate Church, New York City. "I really like [this book]. It is . . . elegantly simple, direct, and forthright. . . . very enjoyable." --Thomas W. Cullinan, JD Executive Director of Gift Planning, University of Maryland.

From the Publisher This resource is a down-to-earth introduction to the complex philanthropy of planned giving. The book illustrates that successful planned giving depends on a nonprofit organization's understanding of the field of development, as well as its commitment to building long-term relationships with donors. From the Inside Flap Planned Giving Simplified A down-to-earth introduction to planned giving by a leading pioneer in the field In this groundbreaking book, charitable gift planning expert Robert F. Sharpe, Sr., demystifies the complex world of planned giving for not-for-profit managers. He provides a detailed blueprint for starting and building a successful planned giving program, and develops a rational framework for managing the subtle interplay of legal, administrative, and interpersonal factors involved in the planned giving process. Central to Sharpe's proven approach is his controversial definition of the effective charitable gift planner as being not so much a fund raiser as an expert at helping potential benefactors satisfy a deeply felt emotional need. Rather than soliciting or closing on planned gifts, the planner's primary focus should be on forming relationships with donors and providing them with the means and opportunity to fulfill their desire to do good. Using compelling case studies, Sharpe demonstrates his approach in action. He identifies the various types of planned gifts and takes you inside the hearts and minds of the planned givers themselves, revealing their primary motivations and overarching concerns. He then guides you, step-by-step, through the entire

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