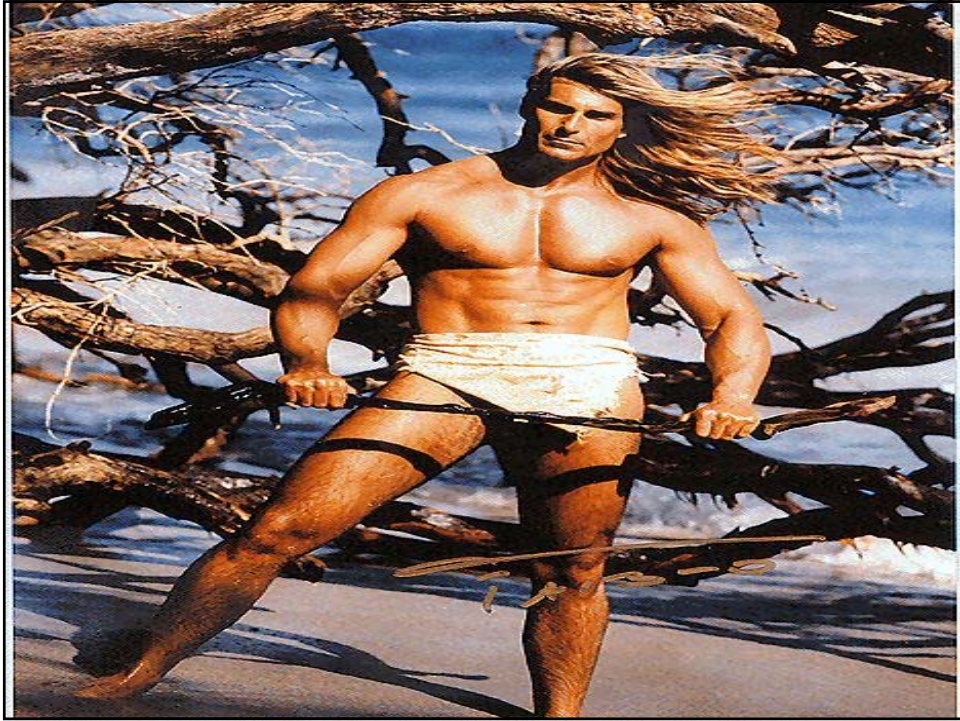


Nine Career and Life Lessons
Learned after 25 Years in the
Fundraising Trenches... aka Planned
Giving Comedy Hour

Bryan Clontz, Ph.D., CFP®, CAP®
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"Twenty years from now, you will be more disappointed by the things that you didn't do, than by the ones you did do."

Mark Twain

"Sometimes the greatest risk... is not taking one."

AIG Commercials

Lesson Learned #1

Embrace Prudent Risk-Taking: Your Life and Career are Risky, But Probably Not Where You Think!

Lesson Learned #2

Be Creatively Opportunistic – Understand the Problem and Create a Solution!

Lesson Learned #3

*Find Out What You Don't Do Well, and Then,
Don't Do That Thing!*

The Most Interesting Man in the World



Lesson #4

Just When You Think You Know Everything, You Don't!



Formal terms lower charitable interest

2014 Survey, 1,246 Respondents, Groups D/E

**Interested
Now**

**Will Never
Be
Interested**

23%

Make a gift to charity in
my will

12%

12% Make a **bequest** gift
to charity

14%

Russell James, Ph.D., CFP – Texas Tech

Lesson #5

Keep it Simple!!!!!!!!!!!!!!

Part 1: Don't Ever Talk with Your IT Person
About Anything!

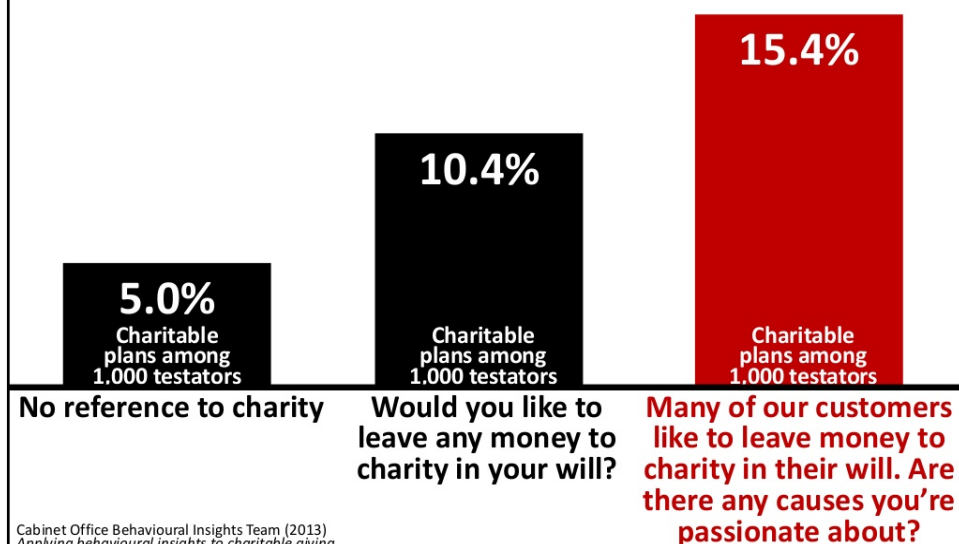
Part 2: Stop Getting Ready to Get Ready!



Lesson #6

Common Sense Isn't as Common as You Might Think!

Charitable bequests are influenced by a simple social example



Lesson #7

Humans are lazier and more manipulable than you would think!



Lesson #8

Practice telling stories, stories and stories - If you aren't telling your story, someone else is... and that won't end well. Keep it simple, but have a **hook!**



Lesson #9

No matter what you do, you and I will be forgotten anyway probably sooner than we think. So don't get so hung up on your mistakes!