

# “Gift Smarter: Coordinating as a Trusted Advisor Team”

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When gift officers and professional advisors work together, a donor’s goals are better met. Donors often have several advisors weighing in on different aspects of planned gifts. When those advisors work together as a team, donor goals can be more thoroughly accomplished and gift transactions can lead to additional gifts or philanthropic leads. Advisor and gift officer coordination can lead to better client service, more efficient gift realization, and fuller address of agency needs.