



ARIZONA
COMMUNITY
FOUNDATION

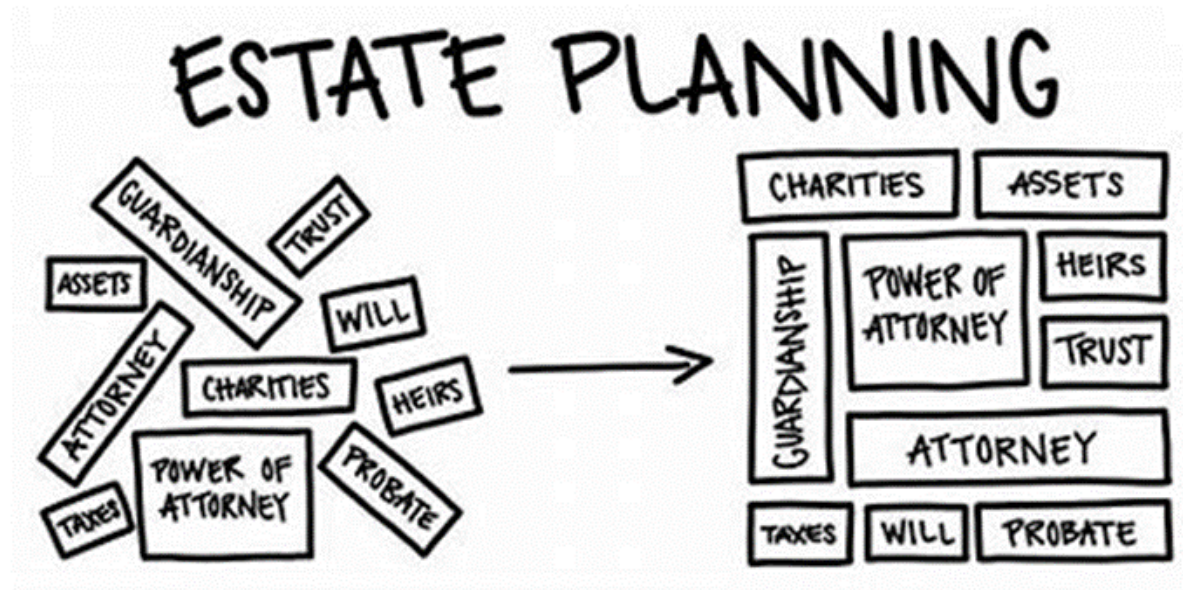
Planned Giving Career Resources

Kristen Mihaljevic

Director, Planned Giving



So, you're in planned giving, now what?



Development Professional

- Events
 - Golf outing
 - Gala
 - Walk-a-thon
- Major Gifts
- Programs
- Board service
 - Volunteer



- ***Donor-Centered Planned Gift Marketing***, Michael J. Rosen, CFRE
- ***Visual Planned Giving*** Russell James, J.D., Ph.D.
- ***Charitable Gifts of Noncash Assets***, Bryan Clontz
- ***The Millionaire Next Door: Surprising Secrets of America's Wealthy***, Thomas J Stanley, Pd.D. William D. Danko, Pd.D.
- ***Asking***, Jerold Panas
- ***Donor-Centered Fundraising***, Penelope Burk

Local Educational Resources

- Alliance of Arizona Nonprofits
- ASU Lodestar Center for Philanthropy and Nonprofit Innovation
- Arizona Community Foundation
 - Planned Giving Basics
 - Arizona Endowment Building Institute (AEBI)

Stu's Views

© 2004 Stu. All Rights Reserved. www.STUS.com



Professional/Networking Resources

- Planned Giving Round Table (PGRT)
 - PGRTAZ
 - PGRTSA
- Association of Fundraising Professionals (AFP)
 - AFP Greater Arizona
 - AFP Northern Arizona Chapter
 - AFP Southern Arizona Chapter





Professional Advisor Resources

- Financial Planning Association (FPA)
- East Valley Estate Planning Council (EVEPC)
- Central Arizona Estate Planning Council (CAEPC)

© Randy Glasbergen
www.glasbergen.com



"I have a diversified retirement portfolio: 40% in bones, 30% in squeaky toys and 30% in stuff I stole from the cat."

National Resources

- National Association of Charitable Gift Planners (NACGP)
- Crescendo
- American Council on Gift Annuities (ACGA)
- Chronicles of Philanthropy
- Lilly Family School of Philanthropy
- GivingUSA Foundation
- Russell James, J.D. Ph.D.
- PlannedGiving.com
- Lynda Sands.com



"The meek will inherit the earth, but the inheritance tax will force them to sell it back to the rich."

Professional Designations

- Crescendo – Gift College
 - Charitable Gift Planning Associate CGPA
 - Charitable Gift Planning Professional CGPP
- The American College
 - Chartered Advisor in Philanthropy CAP®
- American Institute for Philanthropic Studies – California State University
 - Certified Specialist in Planned Giving CSPG

You don't have to know everything

- Refer donors to their trusted professional advisor
 - Attorney
 - Tax professional
 - Financial advisor
- Gifts you don't want to take
 - Arizona Community Foundation
 - The Dechomai Foundation





QUESTIONS

- Kristen Mihaljevic
- 602-682-2054
- Kmihaljevic@azfoundation.org