



## ***JAMES E. CONNELL & ASSOCIATES***

***Charitable Estate and Gift Planning Specialists***

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### **What a Gift Planning Consultant Can Do For You and Your Organization**

- 1. Provide ready access to experienced professional who understands your mission and needs resulting is a quick start for new programs and expanded results for established programs at a reasonable cost.**
- 2. Provide program development, strategic planning and marketing expertise.**
- 3. Initiate gift planning with qualified prospects and leadership.**
- 4. Conduct board and volunteer training on the opportunities, and tools and techniques of charitable estate planning.**
- 5. Establish and conduct external seminars for donors and professionals.**
- 6. Provide calculations using planned gift software and expertise on proposal development.**
- 7. Mentor staff on motivations of donors, responding to inquiries, development of proposals and prospect questions.**
- 8. Review and assessment of charitable estate and gift planning capacity.**
- 9. Administrative support for existing agreements and oversight of administrative processes.**
- 10. Guidance on effective stewardship and recognition of donors.**
- 11. Periodic updates for professional advisors.**
- 12. Develop solutions to complex donor gift asset transfer situations.**
- 13. Oversight of state regulations governing gift annuity programs and other agreements.**
- 14. Identification and review of top 25 to 50 probable planned gift donors.**
- 15. Establish benchmarks for success.**

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***"Building Endowments for American Charities"* ♦♦♦♦ member Certified Senior Advisors**