

A Planned Giving Program In One Hour Per Week Resources

WELLS
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Websites:

1. **The Colorado Planned Giving Roundtable**, www.CPGR.org
Contact: Tina Drum, 303-932-6168, CPGR@MSN.com
 - Educational events throughout the year, with local and national speakers
 - Networking with experienced gift planners from around the state
 - Leave-A-Legacy.® Free gift planning marketing materials (customizable brochure, advertisements, posters, and logos.)
2. **The Partnership for Philanthropic Planning**, www.PPPNet.org
 - A national resource on gift planning, including the “Model Standards of Practice for the Charitable Gift Planner” and the “Syllabus for Gift Planners.”
3. **The Planned Giving Design Center**, www.PGDC.com
 - A national resource on gift planning, with articles, case studies, news stories, and technical reports.
4. **The Center on Philanthropy at Indiana University**, www.philanthropy.iupui.edu
 - Be sure to look at the “Pre Course Readings.”
5. **The American Council on Gift Annuities**, www.ACGA-web.org
 - Learn all about charitable gift annuities.
6. Dick Livingston’s donor-focused website, www.BestWaysToGive.com
 - Learn about gift planning from the donor’s point of view.

Customizable Templates:

1. “Fact Sheet for Donors,” “Ways to Give,” and “Information for Advisors,” included with this presentation.
2. Planned Giving “Weekly Activity” list, included with this presentation.
3. “Bequest Program Fact Sheet for Board Members,” included with this presentation.

Books (short list):

1. *Donor-Centered Fundraising*. Burk, Penelope. Chicago, IL and Hamilton, ONT: Cygnus Applied Research, Inc. 2003 www.CygResearch.com
2. *How to Write Fundraising Materials That Raise More Money*. Ahern, Tom. Medfield, MA: Emerson & Church. 2007. www.AhernComm.com
3. *Made to Stick, Why Some Ideas Survive and Others Die*. Heath, Chip and Dan Heath. New York, NY: Random House. 2007. 2008. www.MadeToStick.com
4. *Forces for Good: The Six Practices of High-Impact Nonprofits*. Crutchfield, Leslie R. and Heather McLeod Grant. San Francisco, CA: John Wiley & Sons, Inc. 2008. www.ForcesForGood.net

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