Your Planned Giving Office

Services for Non-Profit Organizations

Your Planned Giving Office provides you with the full range of support services to handle any planned giving opportunity. You have a highly experienced Planned Giving Director always available at a fraction of the cost of hiring a full time staff person. As a client of **Your Planned Giving Office**, you have access to all of these services:

Getting Started Services — If you are starting a new planned giving program, or reviving an unproductive program, we get you moving quickly and effectively. These services include: Policies and Procedures ◆ Marketing Plan ◆ Marketing Materials ◆ Prospect Management System ◆ Board Training ◆ Staff Coaching ◆ Full Technical Support — everything you need.

Donor Identification and Solicitation Services — We work with you to develop your donors, from prospect identification to cultivation and solicitation. We guide you through the entire process, helping you with each case. We provide you with gift illustrations, and we are always available to answer donor questions and work with their advisors.

Technical Support Service — We provide expert technical support, so you can focus on donor relationships. We provide assistance with all planned gifts, including bequests, beneficiary designations, gift annuities, charitable trusts, stocks & bonds, real estate, life insurance, collectibles and all other types of gift arrangements. We coordinate gift arrangements and set-up, and we help you find qualified, affordable attorneys and tax experts, when needed.

Gift Annuity Services — We provide full support for gift annuity programs, including new program start-up, state registration, policy and procedures manual, forms and documents, staff and board training, illustrations and contracts, and selecting a CGA management service. We take the worry out of starting and managing a gift annuity program.

Fee Schedule: $1000 per month, which provides you with 8 hours of service plus unlimited on-call assistance for quick questions by phone and email. Any additional hours are billed at a declining rate, based on the number of hours used. You decide how the 6 hours are used each month, so that you can use the service as efficiently as possible. There is no long-term obligation. You may cancel at any time for any reason. Call Today.

PGC PLANNED GIVING COACH

Services are provided through Florida Philanthropic Advisors, LLC, a registered fund raising consultant in the State of Florida. These services are personally provided and supervised by John Elbare, MBA, CFP®, Principal, with over 25 years experience with planned gift development and design.

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