

[Free] Invest in Charity: A Donor's Guide to Charitable Giving (Wiley Nonprofit Law, Finance and Management Series)

## Invest in Charity: A Donor's Guide to Charitable Giving (Wiley Nonprofit Law, Finance and Management Series)

*Ron Jordan, Katelyn L. Quynn*

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**Ron Jordan, Katelyn L. Quynn : Invest in Charity: A Donor's Guide to Charitable Giving (Wiley Nonprofit Law, Finance and Management Series)** before purchasing it in order to gage whether or not it would be worth my time, and all praised Invest in Charity: A Donor's Guide to Charitable Giving (Wiley Nonprofit Law, Finance and Management Series):

4 of 4 people found the following review helpful. A helpful guide for new major gift donorsBy Norman OlshanskyInvesting in Charity: A Donor's Guide to Charitable GivingBy Ron Jordan and Katelyn L. QuynnJohn Wiley and Sons, Inc. 2001Reviewed by Norman Olshansky: President NFP Consulting Resources, Inc. Sarasota, FloridaIf you are looking for a resource that explains the various methods of charitable giving and can be used to help donors (or beginning development professionals) determine which is the best approach or instrument for their personal use, "Investing in Charity" can be a most helpful addition to your library.The authors promote the book by claiming it is written for modest as well as wealthy donors. Personally, I believe this book can best be used to help donors who are considering "major" gifts or who plan to make a large number of significant gifts. The book can help them determine how to maximize the impact of their giving for their favorite charities and themselves. Even though the introductory chapters on donor motivation, selecting a charity and how charities function are too simplistic for a major donor, the rest of the book can be very valuable as it relates to the various methods of giving.I especially liked the way the authors go into detail on planned gifts, trusts, and annuities. They give excellent explanations of the variety, benefits

and liabilities of each method, from the perspective of the charity and the donor. The sections on tax implications are also presented in clear and helpful terms. Equally helpful, are their chapters on Private Foundations, Supporting Organizations and Donor-Advised Philanthropic Funds. Planned giving, estate planning, trusts, gifts of closely held stock, gifts of non cash assets, insurance, etc. can be complicated and overwhelming. Helping a potential donor understand how they work and the benefits of these instruments could turn, what would have been a 5 figure gift, into a 6 or 7 figure gift. Each chapter ends with a helpful checklist and series of questions which can help direct the donor to the sources contained therein. In addition, examples are given of specific language which can be used for those who want to deed property or make testamentary gifts. Helpful information is also given on the use of charitable giving as a tool to enhance retirement planning. An extensive index at the end, adds to the usefulness of the book as a resource guide. This book will get good use in my library. I give it 4 stars. 8 of 10 people found the following review helpful.

Accurate, But Dull and Incomplete  
By Mike Moran  
This book does enable donors to learn and accurately negotiate the technical details of sophisticated charitable giving, but it stops short of really guiding or "empowering" them. For one, it fails to celebrate and build upon the motivating excitement of why donors give and how the nonprofit sector is so vital and inspiring. Example: The words policy or advocacy are never mentioned as charitable options or types of programs. It's a dull read: donors must practice "due diligence." The message: giving money away is such hard, complicated, serious boring work you will wonder what happened to the joy of giving and the joy of charitable results. Second, the authors inexplicably ignore the option of using community foundations. Third, much valuable information is omitted: There isn't any mention of the many services of the Council of Foundations or similar helpful organizations. Are 501(c)(4) organizations eligible for gifts? We're not told. In the whole text I could find only two web sites mentioned! Nor does the book offer any referral section or recommended reading. Venture philanthropy - no mention! Fourth, instructing donors they "must" visit the charity's site, meet its executive team, AND examine all its core literature before deciding to give is extreme. Ugh.

A Complete Guide to Personal Philanthropy Are you one of the newly wealthy with an interest in "giving back" . . . an heir to money you'd like to share with a favorite cause . . . or simply someone who would like to do good in your community? There are more opportunities than ever for people of every financial station to make a difference through charitable giving. But how do you choose among the many options available, and how do you know which type of gift is best for you? Invest in Charity: A Donor's Guide to Charitable Giving will teach you everything you need to know to devise and follow an effective charitable giving plan. It explains how to find the right charity; understand the tax, estate, and financial considerations; and select a gift-whether it's a one-time cash gift or a lifelong annuity. Covering everything from researching the legitimacy of a nonprofit organization to navigating the tax and estate laws that apply to you, this guide will help you make your bequest with complete confidence that it's right for your charity and for you.

"This book is exceptional-clearly organized and well indexed. It provides an A-Z walking tour of planned giving." (Foundation News and Commentary, July/August 2002)  
From the Inside Flap  
Giving to charity is a truly noble act; one that has its financial as well as emotional rewards. The motivations for giving, and the results desired, are as varied as the individuals involved. Do you want to establish a scholarship at your alma mater? Feed the poor in your neighborhood or shelter battered women? Underwrite a children's theater? Are you seeking tax benefits or a way to reduce the size of your estate? The choices are many; and, for the novice, daunting. Invest in Charity: A Donor's Guide to Charitable Giving tells you everything you need to know to make charitable giving the fulfilling experience you seek. In this clear, authoritative guide, two highly regarded planned-giving professionals help you formulate a personalized Donor's Action Plan in which you set your goals and decide on the right path to reach those goals. They explain all your gift options and their implications, and then take you step-by-step through the process of planning. You will consider: Why you want to make a gift and how you want your gift used. Whom are you trying to help? Will the gift be made in honor of a loved one or to leave a legacy of your own? Is tax savings a factor? Do you wish to support a program, such as a lecture series, scientific research, or community project, or to pay for a capital project? Clarifying your desired outcome will help you make your choices as you develop your philanthropic plan. Which charity should you choose? Learn how to select charitable organizations to find the right one. Invest in Charity explains 501(c)(3) charities, conducting a site visit, examining mission statements and gift-planning literature, meeting with the charity's officers, and checking out the legitimacy of a charity. Which assets will you use to make your gift and what type of gift should you make? Will you be giving cash, stock, real estate, mutual funds, or personal property? Do you seek a charitable income tax deduction? Can you use planned giving to assist in your retirement planning? You'll explore the financial details of charitable giving plans, including pledges and annual gifts, annuities, trusts, gifts through your estate, and other investment policies offered by charities to see which provides the greatest benefit to the charity and you. Written for every donor; from the wealthiest philanthropist to donors with more modest means; Invest in Charity prepares you for doing the best you can for your charity . . . and yourself.  
From the Back Cover  
A Complete Guide to Personal Philanthropy Are you one of the newly wealthy with an interest in "giving back" . . . an heir to money you'd like to share with a favorite cause . . .

or simply someone who would like to do good in your community? There are more opportunities than ever for people of every financial station to make a difference through charitable giving. But how do you choose among the many options available, and how do you know which type of gift is best for you? *Invest in Charity: A Donor's Guide to Charitable Giving* will teach you everything you need to know to devise and follow an effective charitable giving plan. It explains how to find the right charity; understand the tax, estate, and financial considerations; and select a gift—whether it's a one-time cash gift or a lifelong annuity. Covering everything from researching the legitimacy of a nonprofit organization to navigating the tax and estate laws that apply to you, this guide will help you make your bequest with complete confidence that it's right for your charity and for you.