



# The Philanthropic Planning Companion: The Fundraisers' and Professional Advisors' Guide to Charitable Gift Planning

*Brian M. Sagrestano, Robert E. Wahlers*

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**A donor-centered guide to charitable gift planning for fundraisers and professional advisors**

*The Philanthropic Planning Companion* compiles and analyzes the latest research on donor/client behavior, discussing the need for segmented approaches to charitable gift planning based upon the values and personal planning objectives of the donor/client. With its many tools, checklists and sample materials, it will serve as your charitable giving guide in your work with your donors/clients. Whether you are building your practice to work with high net worth clients or you are enhancing your fundraising program, this is the book you will keep close at hand.

- Outlines how an integrated, donor-centered, values-based, philanthropic planning approach can be implemented
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For fundraisers and professional advisors alike, *The Philanthropic Planning Companion* is the one-stop resource you'll keep by your side to help your donors/clients meet their charitable and personal planning objectives.

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