HOLT CONSULTING

Turning Wealth Into What Matters

Turning Wealth Into What Matters™

A *Strategic Plan* to Amplify Your Practice

YOUR FAVORITE CLIENTS HAVE SOMETHING IN COMMON.

They're people of character who want more from an advisor than just accumulation and tax reduction. They want to ***give meaning*** to their wealth. They want to pass on their ***values*** - not just their valuables.

WOULD YOU LIKE TO

~Serve your favorite clients better. ~

~ Attract more like them. ~

~ Amplify your practice with strategic charitable planning. ~

THIS PROGRAM WILL GIVE YOU THE SKILLS YOU NEED TO:

Deepen Client Relationships: Get to know clients on a deeply personal level and watch those relationships flourish.

Get More Referrals: Discussing philanthropy heightens your relationship in the community. Clients talk about their giving experiences with family, friends, and colleagues.

Connect with the Next Generation: Clients want to pass their values to the next generation. They do this by involving them in the giving process. Be an integral part of that conversation and get to know the whole family.

How Does it Work?

Each month for 5 months you will receive:

1. Two 60-90 minute webcasts taught by Dana.
2. Two hours of telephone coaching time with me to put your learning into action and receive expert guidance on your cases.
3. Unlimited answers to your questions via e-mail.
4. Private LinkedIn Group for past and current participants.

What Will You Learn?

Module 1A: - Uncover Your Potential for Growth

- Growth Requires giving meaning to wealth. *THIS is your potential!*
- Where do you want to take your practice?
- Understand what your clients want from you.
- Act with a sense of abundance, not scarcity.
- Give your clients the opportunity to *Turn Their Wealth Into What Matters!*

Module 1B: - Chart Your Course to Growth

- Commit to Growth
- Document Your Growth Goals with numerics and a timeline.
- Outline Steps for Action
    1. Education
    2. Case-storming: Discuss donor cases with your team and with me.
    3. Put Learning Into Action
    4. Networking & Additional Resources

Modules 2-10 - Amplify Your Skill

Explore advanced planning techniques and how incorporating charitable planning strategies **enhances a plan in completely new ways** - providing ***increased financial benefits, tax advantages, and happiness!***

Modules 2-10 will focus on one of these categories.

Stocks & Mutual Funds	Real Estate	Personal Property/ Collections	Farm Machinery/ Crops/Animals	Donor Advised Funds
Retirement Accounts	Business Assets	Life Insurance	Intangibles/ Virtual Currency	

BONUS Module 11: Unleash Your Success

- Help all your clients turn their wealth into what matters to them
- Start productive charitable planning conversations
- Market charitable planning Ideas
- Partner with local nonprofits to assist you and your donors.
- Join a professional network or two to continue your education and stay connected with like-minded professionals.

A deep understanding of advanced planning techniques and their charitable companions will give YOU the ability to design the very best plans for your clients.

The lessons in this program come from my experience working on cases big and small; simple and complex; from one end of the U.S. to the other. Transforming just about every asset you can imagine into great gifts. From stocks to real estate - royalties to farm machinery.

Pricing Per Student: $2500
Textbook: *Charitable Gifts of Noncash Assets* by Bryan Clontz - $29.

ENROLL TODAY AT

HOLTPLANNEDGIVING.COM

Testimonials

"Dana has a rare combination of deep technical skills and polished people skills that make her not just an advisor you go to for answers but someone that professionals and clients enjoy working alongside. She has such an inquisitive charitable gift planning mind -- and it shows in her work and attitude. It makes her a fantastic resource for nonprofit professionals, donors, and advisors alike when challenging situations surface."

~Eric Joranson, Director of Development, National Philanthropic Trust

"I have known Dana for nearly 10 years and in that time I have come to rely on her expertise in the gift planning arena. Recently, I attended one of her presentations. The information was up-to-the-minute current, extremely relevant and useful. Her depth of knowledge is great, and she has a knack for conveying complex information in a very digestible way. And she has a great sense of humor!"

~Rebecca Otten, Director of Development, St. Olaf College

"Dana has a thorough understanding of financial and legal issues that are at play in charitable giving strategies, and a knack for breaking down complexities into simple to understand solutions to meet the donor's charitable and finance goals. She always projects professionalism, and she has a no-nonesense "get it done" attitude, which instills trust in donors and their advisors. She's easy to work with, meets deadlines, and has excellent follow-through. Plus she's fun!"

~Cindy Aegerter, Senior Gift Planner, inFaith Community Foundation

"I have had the pleasure of working with Dana in the planned giving field for more than a decade. She has a keen ability to assess opportunities, identify solutions and make them a reality. Plus, she's a hoot!"

~Lori Anderson, VP of Marketing Communications, inFaith Community Foundation

"Dana has extensive planned giving experience and works hard to ensure charitable plans are donor-centric, comprehensive, and impactful."

~R.S., (Advanced Markets Professional in Financial Services)