HOLT CONSULTING

Turning Wealth Into What Matters

TURNING WEALTH INTO WHAT MATTERS™

Gift Planning Doesn't Have to Be Intimidating!

LESS THAN 10% OF AMERICA'S WEALTH IS CASH

It's true - Americans hold less than 10% of their wealth in cash. The rest spends it's days living as things like real estate, life insurance, retirement accounts, and other interesting assets.

That's where the real money is, but charities constantly "*chase the checkbook*" and donors focus on giving from their checking accounts rather than the rest of their assets.

With the TURNING WEALTH INTO WHAT MATTERS™ Gift Planning School you will learn the skills you need to unlock the other 90%!

De-Mystify Planned Giving: Until now charitable gift planning has been a mysterious blend of tax wizardry, voodoo, and legalese. *This program will de-mystify it for you.*

Develop Confident Conversations: When you understand a donor's assets and planning concerns, you'll have more informed and productive conversations with donors and their advisors.

Discover More Opportunities: Non-cash gifts coincide with specific events in a donor's life. When you understand these events, you'll see potential gifts all around you.

WHAT DO YOU GET?

1. **Eleven live webcast modules taught by Dana**
2. **Ten hours of personal one-on-one coaching with Dana**
3. **Unlimited e-mail support**
4. **Membership in a private LinkedIn group for current and past participants.**

WHAT WILL YOU LEARN FROM THE MODULES?

Module 1A: Uncover Your Potential

- Growth Requires Accessing Wealth - Not Just Cash Flow. **This is your potential!**
- How to take your organization's fundraising to the next level.
- The kinds of donors you'll need to get there.
- New systems and resources you'll need to make it possible.
- Start acting from a place of abundance - not scarcity.
- How to give your donors the opportunity to GIVE BIG!
- Work smarter - not harder.

Module 1B: Chart Your Course

- Chart your growth plan.
- Document your growth goals with numerics and a timeline.
- Outline your steps for TAKING ACTION!

Modules 2-10: Amplify Your Skill

- How different assets work from a tax and legal perspective.
- When, why, and how a donor would want to give a particular asset.
- Best giving techniques for each asset type.
- Best practices for accepting various assets.
- Resources to help you make this a REAL POSSIBILITY.

Modules 2-10 will dive deep into these areas.

Stocks, Mutual Funds, Stock Options	Real Estate	Personal Property/ Collections	Farm Vehicles, Crops, Livestock
Donor Advised Funds	Retirement Accounts	Business Assets	Life Insurance
Intangibles, Virtual Currency			

BONUS Module 11: Unleash Your Success!

- Help all your donors turn their wealth into what matters to them.
- Raise awareness of asset giving across all channels - conversations, print, website, and social media.
- Start asset giving conversations.
- Market asset giving ideas through stories.
- Partner with professionals to assist you and your donors.
- Join a network to continue your education and stay connected.

WHAT IS "COACHING TIME"?

Coaching time is designed to help you put your learning into action and give you guidance on whatever is most important to you *right now*. Here are examples of the kinds of guidance some students have received:

- Writing donor stories and appeals
- Drafting/updating gift acceptance policies
- Career advancement in fundraising
- Deeper dive into material from online modules
- Specific donor gift situations
- Answers to technical questions
- MUCH MUCH MORE!

WHAT DOES IT COST?

YOUR NONPROFIT BUDGET	TUITION PER STUDENT
< $399,999	$1200
$400,000 - $1 MILLION	$1500
$1MILLION - $5 MILLION	$1800
> $5 MILLION	$2100

Textbook: $29: *Charitable Gifts of Noncash Assets by Bryan Clontz*

ENROLL TODAY AT
HOLTPLANNEDGIVING.COM

NOTABLE CLIENTS

Mayo Clinic
Be The Match
Minnesota Opera
Gustavus Adolphus College

WHAT OTHERS HAVE TO SAY...

"I've worked for Mayo Clinic for over 20 years. This is the best thing they've ever donor for me!"
~Bethel Ruest, Gift Planner, Mayo Clinic

"Our IRA Rollover gifts have increased 200% within a few months of beginning this program!"
~Anna Waugh, Mississippi Park Connection

"We are learning so much! Dana is helping us to shape our future."
~Jill Kohler + Nancy Holden, Interfaith Outreach & Community Partners.

"Dana takes all of the intimidation out of any gift planning concept. She frames even the most complex gift ideas into language that donors, gift planners and professional advisors can easily understand. I know I can count on her competency in any situation. You don't have to know everything about gift planning… but you do need to keep Dana close."
~Brenda Moore, CFRE, Brenda Moore & Associates

"I have known Dana for more than 10 years and in that time I've have come to rely on her expertise in gift planning. 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."
~Cindy Aegerter, Senior Gift Planner, inFaith Community Foundation

"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, JD, Senior Director of Development, National Philanthropic Trust.