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HELP! I need somebody HELP! Not just anybody*

BY KATHRYNE CARDWELL

"I need an assistant!"

That's the typical phrase which comes to mind when you're swamped. You're busy, your supervisor is busy, your colleagues are busy, and you need someone to help - now.

It's no wonder you're so busy, either. Making calls doesn't just mean going over to visit someone. You need to schedule the call and prepare for the visit first, then file your notes and follow up on your donor's requests after. Then factor in travel time. If your organization expects you to make three calls a week, you're probably away from your desk for at least eight hours each week - that's a full work day.

But a rank and file assistant isn't enough.

You need an informed, empowered, capable assistant. More than that, you need to be willing to use that assistant strategically.

Have you ever thought of sending your assistant on stewardship calls? What about asking him or her to follow up with someone who has requested information about bequests? And when non-planned giving staff members have questions about estates, who answers them - you, or your assistant?

Imagine how much more you could accomplish if you had someone to help you with these time-consuming tasks.

An empowered assistant can be the best tool you have to help you fundraise. If sending your assistant to have tea with Mrs. Jones allows you to go on a call and ask Mrs. Smith for a million dollar bequest, then you're on the right track.

Development officers may feel reluctant to use their assistants this way. They may feel it isn't right to pass off duties like the ones above. They may feel uncomfortable handing off their donor to someone else. They may feel their assistants are not qualified to handle these duties, or that they will neglect their regular duties when handling these special assignments. And, in this age of tightening budgets, they may feel they are adding extra duties to their assistants' job descriptions without properly compensating them.

I can tell you this isn't true.

I have worked as a planned giving coordinator - an assistant - for a wonderful manager for three years. I provide regular administrative support, such as scheduling meetings, drafting letters, and making travel arrangements, but I also go on stewardship calls, plan and attend events, and help create our marketing and stewardship strategies. I haven't just stayed at my job for three years because I enjoy it. I also stay because I'm gaining valuable skills that will transfer to any other career path I choose to take.

And I feel confident saying that working as an empowered assistant has benefitted my manager and her fellow planned giving officer as much as it has me. Having me handle the things I do makes her life easier and makes mine more interesting.

Let me tell you some of the benefits of empowering your assistant:

- Donors who come to like and trust your assistant will often see him or her as the go-to person when they have basic questions. I've had donors ask me to find out how much money is in their endowment funds, or to find out details about events. This saves time for my manager, and, since she's often on the phone with donors or out on calls, donors may get a quicker response from me than they would from her.
- My manager has taken the time to educate me about planned gift vehicles. Other staff will often come to me when they have questions or need materials. Once again, this saves time for all concerned.
- Sending your assistant to steward someone frees you to make other calls yourself, or to tackle the things on your desk which you really can't pass on to someone else. I accompany my manager on stewardship calls, when appropriate. Sometimes I even go on stewardship calls by myself!
- Introducing your assistant to the fundraising world will let him see it as a potential career, and letting him take on specialized duties will help him decide if this is something he really wants to do. The demand for fundraisers is growing, but the pool of eligible people isn't keeping pace with demand. Until I started at my current job, I had never considered fundraising as a career. (Mostly, because until I started working I had no idea professional fundraisers existed!) Now it's something I could see myself doing in the future.
- It can be an important component of a succession plan. There is high turnover in the fundraising sector. If you lose one of your development officers, it could take months to find an eligible person to fill that position. Empowering junior staff can give them the skills they need to move upwards at a second's notice, which is both a reward for the individual and a relief to you as a manager.

So how, exactly, do you use your assistant to your advantage?

Know what you need

Find out what keeps you from getting things done.

Are you flooded with calls from donors who just want to chat? Do you get constant requests for information, but don't have time to follow up? Do you dread going on calls because you know you'll come back to the office and find your inbox full, your voicemail crammed, and your email overrun?

Decide what you can delegate. Perhaps your assistant can follow up with people who have asked for information, and set up calls for the people who want to meet. Your assistant might phone some of your long-term donors to keep in touch with them so you have more time to meet new people. And, if your assistant knows the details of estate gifts, she can answer questions for staff when you aren't in office.

Just be sure to set boundaries so you and your assistant know what she can and can't handle. There are things, unfortunately, you can't pass on, and a good assistant will know when she isn't qualified to handle something and needs to bring it to you.

Know their strengths

My manager knows I enjoy writing, and she knows that writing is time-consuming. I write most of her letters, most of the content for our newsletters, and most of our reports. Recently, she's even had me write grant proposals, applications, and evaluations. Once I finish the first draft, she reviews for accuracy and makes changes as necessary. Having me write these materials saves her copious amounts of time, and she reviews everything to make sure we're sending the messages she wants to send.

Another strategy we've developed is sending me to interview donors, write up their stories and publish them in our newsletters. People generally enjoy talking about themselves, and interviewing donors in person is a wonderful way for me to steward them and give my manager time to make other visits.

If your assistant is doing something that she enjoys and does well, then there's a good possibility she'll be happy and productive, which you'll find is contagious! Recognize your assistant's strengths, and utilize them. If an individual is good with numbers, why not have her manage your regular reports? If he has an eye for details, have him proofread your letters and handle estates.

Include your assistant on donor calls when you can

Learning to talk to donors is an art. And how can you learn to do this, except by practice?

You wouldn't feel awkward about including a dean, board president, or new development officer on a call, and you shouldn't feel any differently about including your assistant. This goes back to succession planning - you're giving your assistant valuable skills that he can take forward into his next position.

As for your donor, she'll probably love to meet someone new.

There are "easy" calls with donors who are pleasant, friendly, and chatty, and there are "challenging" calls with donors who need to be drawn out. Adding a new person to the equation usually helps more than it hinders - it can liven the company, refresh the conversation, and brighten someone's day.

Of course, there are always certain donors who wouldn't enjoy meeting new people, and that's fine. You'll know when it's appropriate to include your assistant on a call and when it isn't.

Keep your assistant aware of department happenings and industry trends

Fill your assistant in about that morning's meeting, tell her about new tax laws and marketing strategies, and keep her aware of what's happening with donors and estates, too. This will help her feel valued and an integral part of the department team. It also gives you opportunities to discuss these things with someone who has inside knowledge but a fresh perspective.

Provide honest and working feedback

Don't brush off mistakes, smooth them over, or get angry without an explanation. Use mistakes as learning opportunities. Sit down and go over what happened and what should have been done differently. Then give your assistant a chance to get it right the next time.

Praise and encourage

Mark Twain could go for days on a good compliment. I could go for weeks. Give specific compliments such as, "You're an excellent conversationalist. You were wonderful at getting Mrs. Brown to talk about her work with animal shelters." Encourage your assistant to ask questions. Allow him to express his point of view. Your assistant may offer valuable feedback or catch mistakes, but it's important that he feels comfortable enough to share it.

Don't just train - educate

This is one of the best ways to empower your assistant. Instead of giving her just the basic tools she needs to do her job, give her more. Explain why you are targeting certain prospects as potential donors. Teach her how different gift vehicles work and encourage her to ask you about things she doesn't know.

Once again, this goes back to succession planning. But it also gives her the skills she needs to make decisions when you aren't around, and to think logically in your environment.

You may feel there is no benefit to your assistant in all that I have described. Once again, I want to point out that empowering your assistant is a mutually beneficial strategy. Your assistant will learn marketable skills and solid industry knowledge. He will respect you for taking the time to teach and encourage him.

In fact, the only downside to this strategy is that eventually he'll want to move on - and you may have to start the process over again!

Kathryne Cardwell, B.A., (kouk@cc.umanitoba.ca) has been part of the University of Manitoba's planned giving team since 2008. She has been fortunate to work with a wonderful team of development professionals, including her manager and mentor, Beth Proven, CFRE. Kathryne is also an established book reviewer and freelance writer, and is finishing her public relations diploma at the University of Winnipeg.

**With apologies to Lennon & McCartney, and a nod to David Love*

It'll Never Fly: Sustainable Donor Recognition

BY MALCOLM BURROWS

My favourite fundraising joke involves a synagogue congregation planning a pilgrimage to Israel. The rabbi holds a meeting of the entire congregation to raise money for the trip. There are presentations outlining the case to raise enough funds to allow all the youth and the less affluent members to participate.

The fundraising portion of the evening starts slowly with some modest pledges. An old man in the corner shakes his head and says loudly and disdainfully: "It'll never fly." His skepticism has the reverse effect, however.

Hearing this challenge passion starts to build in the room. The pledges grow in number and value. Still the old man mutters: "It'll never fly." And so the room gets louder and more adamant. People rise to their feet and throw money at the problem. Finally the richest man steps forward and defies the skeptic. "I'll pledge to pay for a chartered jet so everyone can go to the Holy Land." "Ach," spits the negative one, "it'll never fly."

The rich man says to the old man: "Why do you keep saying it will never fly? This synagogue has come together as a community. We have raised the money to pay for a jet and covered all costs. We are going to Israel."

"Yes", said the old man, "but with the weight of all the donor plaques, it'll never fly."

The Weight of Donor Recognition

Donor recognition does indeed weigh a charity down with literal and figurative baggage. Recognition – most obviously in the form of plaques and donor walls – is the best friend of major gift and gift planning fundraisers. It is our crutch, our leverage, our bait. And, over time, the promises of recognition accumulate, especially at institutional charities – such as hospitals, universities, schools, and arts organizations.

Initially the problem is real estate. What happens when you run out of space to recognize donors? Are elevators compelling enough? Are there enough seats – or bathroom cubicles – to say "thank you" in a public way to the kind donors who helped construct the building or fund the activities it hosts? At a certain point, probably not.

There has been a long-standing challenge about space. It's available when a building first goes up, but how do you recognize donors for renovations or endowments or activities? What was the original understanding of the donors who gave the initial funds? Did they realize their moment on the wall was time-limited? Were promises made in the heat of a campaign to provide the donor with "perpetual" recognition when the practical life of the building is only expected to be 25 years?

The answer to these thorny practical problems has been a mixture of policy, creativity, and blunt pragmatism.

For How Long?

These questions became very real for me recently when I was asked to review a proposal for a client for a specialized research/clinical "centre" at a large teaching hospital.

Since I have been in the gift planning business for 20 years, I knew the hospital foundation well. Indeed, I distinctly recalled that 15 years ago this specialty area at this hospital had announced a large gift to name a "centre" to advance work in this area. A quick check confirmed a $5 million gift, some endowments and chairs, and the fact that the word "perpetuity" had been promised at inception. The puzzling thing about this proposal – which was for more than $5 million – was that it discussed the accomplishments of the medical and research team but made no reference to the Centre established 15 years previously or the donor it was named after.

Now, admittedly, the new Centre has a slightly different focus than the old, but it was a closely related area and purpose. I found it disheartening to think the previous entity and the donor who funded it had been conveniently forgotten – either accidentally or on purpose – when the new pitch came to be made. History rewritten didn't inspire much confidence in the promises contained in the new proposal.

It would have been much better for the proposal to celebrate the previous donor. This would show continuity of donors providing support for innovation and life-saving care. It would show donors are not forgotten in a few short years. Surely, there were still plaques in the hospital that would reveal the previously announced entity. Surely, someone would remember.

Yet, that is just the problem. The fundraising imperatives of today can make a mockery of the promises made to donors yesterday. There is only so much real estate, both in a physical and a brand sense. Institutional memories are very short, and even when they aren't, current financial needs nudge out the past. Donor relations programs focus on the here and now. There aren't adequate funds to ensure compliance with old agreements within a complex organization. In my experience, the time stewardship is most often front-and-centre is when a new campaign is on the horizon. The focus on accountability is packaged as a stewardship – or "mea culpa, we're sorry we forgot you" – campaign that reestablishes contact in preparation for a new solicitation.

To investigate the gap between intent and implementation more fully, I resorted to Google to see if I could assess how many of the promises around the endowment and chairs had been upheld. One of the basic promises of endowed chair fundraising is that the chairholder will cite the name of the chair in any public citations: publications, website, business cards, media references. Of the older chairs I checked, the actual compliance was all over the map. Some chairholders lived up to the spirit and letter of the original gift agreement, and others did not. Although these chairs were in a single university system, there was no consistency of usage. With academics, practice was all over the map.

To be frank, this isn't surprising.

I'm sure some institutional charities do a better job than others in monitoring historical promises of donor recognition, but with limited budgets and pressing needs it just isn't a priority.

My sense, perhaps naïve, is that many Ivy League institutions are better at getting it right. These universities have a longer and deeper philanthropic tradition and there is greater dependence on donors than in your average government-funded Canadian entity. Heck, I might even speculate this lack of follow-through in Canada is an issue of one part stewardship resources, one part institutional amnesia, and one part cultural distaste for donor recognition. The institutions neglect past donors because later generations of administrators feel uncomfortable with the initial promises made. Is it a subversive populist backlash against privilege and wealth?

Aside from this cultural speculation, there are moral, legal, and practical implications. The practical issue for charities offering this kind of recognition is: what happens when donors notice? Will they care? Will they sue? Or is our collective memory too short to worry about the legacy of previous generations? Will donors become more cynical? Will they stop giving? Will families come demanding restitution? Or, is there a fundamental, unspoken understanding that time is like a wave that first washes away details and then perhaps the sand castle itself? We may talk of the perpetual future but we all live firmly rooted in the ever-changing present.

Keeping the Plane Aloft

Although there is an element of inevitability in charities not living up to recognition promises, I do believe institutional charities in Canada are now at a point when this issue needs to be given more attention. It has been just over 15 years since Canadian institutional charities discovered major gifts from individuals. The plaques are piling up, as are the endowments. The question of how charities plan to provide consistent long-term recognition should be considered in policy, compliance procedures, and a culture of living stewardship. There were promises made. How important is it to charities and donors that they are kept?

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Marketing your Planned Giving Program

BY SARA PENNER, M.A., and KRISLYN GLAYS

Whether your organization has a seasoned planned giving program or is just getting off the ground, whether you have staff dedicated to the program or someone does it off the side of their desk, marketing is an incredible tool to help increase the success of a planned giving program.

There are many components to the planned giving program cycle, including prospecting, education, relationship building, and stewarding. But no matter what part of the cycle your program is at, marketing should be a dedicated component.

So how do you identify the prospects and start the cycle? That's what we hope this article will help you with.

We have laid out five simple steps to help any organization market their planned giving program.

As any fundraiser knows, relationships and face-to-face meetings are key to the success of a planned giving program. Marketing can be your "golden ticket" to start the cycle to develop those relationships and to get those meetings. It is what will efficiently and effectively identify those donors who are most interested in your organization, and what will provide people the opportunities to self- identify.

Before we get too far into this plan, we'd like to make it clear that, to start with, we suggest you keep your marketing simple. Since bequests are the most common type of planned gift and show the greatest results, this is where to invest your efforts and resources in marketing.

You may be asking yourself: is it really worth investing your time and money marketing planned gifts (bequests), especially if you don't have the staff resources?

These statistics truly speak for themselves:

- The average bequest nationwide is $32,000

- Bequest revenue in Canada and the USA totals more than $20 billion annually
- Reports show there is $50 billion in bequest potential

With 50 billion in potential bequests, we were interested to see how much potential our Hospital Foundation has.

Using the formula from "Donor-Centered Planned Gift Marketing" (Michael J. Rosen), we were able to determine our planned giving potential. The formula looks at the size of your database and your average bequest and combines that with stats on averages of planned gifts.

We were excited to find that our low end potential was $26 million, and our high end was $165 million in expectancies. With our 90 known bequest expectancies averaging $30,000 per bequest totaling $2.76 million, we are far from our potential!

If you are as excited as we were then, you probably want to start working towards getting closer to your potential.

We hope the next 5 steps to marketing your planned giving program will help you to develop a marketing strategy that can help you reach your full potential.

Step 1: Take Stock

Review what you are currently doing and what has been done in the past. Gather all mailings and collateral material including letters, brochures, and newsletters from the past two years. Get information on events and educational sessions that have been held, as well as any newspaper or radio ads.

It's important to avoid reinventing the wheel if possible. Also, it's important you have a good understanding of what your prospects have been exposed to and what information they may already have.

Step 2: Determine Your Best Prospects

Because most organizations don't have the staff resources to work with all their potential prospects, you will need to segment your database to identify your best prospects.

Research shows the best prospects are those who have the closest relationship to the organization. Some examples are:

- 10+ year donors
- Monthly donors
- Volunteers
- Board/Committee members
- Donors who show a strong interest in your organization

Tip: Don't just focus on the age and wealth of the prospect. Years of giving, number of gifts, and contact with your organization are much better indicators of planned giving prospects.

Step 3: Review Your Resources

Now that you have identified your best prospects, you need to market to them. This is where you are going to have to determine the time and effort your organization can allot to this initiative.

If you have a staff person dedicated to the growth of the program, then the possibilities to get your message in front of your best prospects are endless; you can create mailings and events specifically for them.

But, if you are like most of us, you need to keep your marketing strategies inexpensive, while limiting staff resources as much as possible. This is why reviewing your resources and seeing where you can incorporate marketing planned gifts is going to be key.

As you are looking at all your potential resources, keep in mind: which avenues are your best prospects most likely to be exposed to?

Here are some ways to incorporate messages about planned giving opportunities in your current resources:

- Website- Update or create a planned giving section, including stories and photos. Feature your bequest expectancy donors
- Newsletter- Create a planned giving section to educate and inspire readers
- Direct Mail- Choose one of your direct mail appeals to be a planned giving story
- Mailed Receipts- Include planned giving information with your tax receipts
- Tours/Events/Recognition- Incorporate planned giving information at all your events
- Print and Radio ads: If you are already running ads for other programs, try adding planned giving in the rotation; Leave a Legacy month (May) is a great time to advertise.

Tip: People don't read Planned Giving newsletters. Planned giving is not an activity in itself. It's an extension of their commitment to your organization - integrate it into your work.

Step 4: Set Goals

While most organizations set overall goals for the revenue generated through planned giving programs, it is also important to try setting goals for each of your marketing strategies. This way you can track what is working and what is not. Every organization is different and not every strategy is going to work for every organization. It's important to track and document what's working for you.

Example: Send a postcard to all your 10+ year donors and invite them to an event with a planned giving focus. Track how many people you invite and how many people attend. Set a goal of what you would like to accomplish with that group and track the results. How many bequest expectancies confirmed? How many new relationships started? How may follow up meetings were set up?

Tip: Postcards have a 95% readership rate. Try them!

Step 5: The Messaging

Keep your messaging donor-focused; use stories to get information and benefits across instead of just stating facts. Don't get hung up on the different vehicles for making a gift.

Again, if you don't have the resources, just keep it simple, and start by marketing bequests. As mentioned earlier, the most popular type of planned gifts in Canada are bequests, making up 90% of all planned gifts.

Keep your message short and easy to understand so you can build it into many areas of your marketing and communications plans.

Some examples: “Have you considered a gift in your Will to Charity ABC?” “Would you consider a gift in your Will to Charity ABC?”.

Try this: Go to wordle.net and type in your mission or the words you use in your brochure. What does it look like? Does it describe a building or piece of equipment? Or does it describe the life changing work your organization provides? The person’s life you’ve saved, the future you’ve created for a child, or the hope you’ve given to a person?

Individuals need to first believe in your organization. Once you have those people invested, you need to give them the opportunity to think about leaving a gift to this organization they care so much about.

If you don’t tell them about the opportunity, who will?

Then, get ready!

If you market…they will come!

Now, someone needs to be prepared to steward those new relationships that are created. This could mean building a case for more staff support, or for an existing staff member to allot some of their time to the area. If you identify the incredible dollar potential available to your organization, combined with a strong marketing strategy and the results of new confirmed bequest expectancies, you will make believers of your CEO and Board of Directors too!

This article is based on a presentation at the third KAIZEN conference, recently held in Winnipeg, Manitoba. KAIZEN encompasses the efforts of the charitable sector to advance philanthropy and bring positive change to communities on a local and global level, and was hosted by the Manitoba Roundtable of CAGP and the Leave a Legacy Manitoba Chapter.

Sara Penner (spenner6@sbgh.mb.ca) has worked in fundraising for 12 years, at the Arthritis Society, the United Way of Winnipeg, and is currently the Director of Development for St. Boniface Hospital Foundation. Sara has been a volunteer with CAGP since 2005. She also volunteers on the University of Manitoba Alumni Board, and has presented at CAGP and AFP educational sessions.

Krislyn Glays (kglays@sbgh.mb.ca) began her career in advancement at St. Amant Foundation, and is currently Manager of Development at St-Boniface Hospital Foundation. She is a member of the Kaizen 2011 Conference Committee.

Can We Make Donors Happy and Create Social Impact?

BY NADINE RIOPEL

There’s a debate in the world of charitable giving.

One side argues the focus of charity should be on the experience of the recipients, and the social benefit.

The other contends the experience of the donor is not given enough attention, that positive donor experience is key to having engaged and dedicated donors.

In my opinion, this debate risks missing a very important point.

I believe the real problem is not that charitable professionals focus too much or too little on making donors happy. I think the problem is we usually take what donors say will ‘make them happy’ at face value.

What donors want, and what it makes them do

When you get right down to it, what most donors actually want is to do good. Which is what nonprofits want, too. The idea that the goals of doing good and of pleasing donors are in opposition is really quite absurd, when you think about it.

Of course donors want to do good. Isn’t that why they’re giving in the first place?

The problem, though, is donors are constantly bombarded with requests to give, and have almost no tools to help them narrow the field to the best opportunities. So they fall back on overly simplistic tactics like focusing on administrative cost ratios, or trying to limit their giving to specific programs.

When donors tell a charity they only want their dollars to go directly to poor children, for example, that may not be what they really mean. What they may actually want is for their dollars to **benefit** poor children. The best way to do that may be, say, financial literacy programs for low-income parents. But the donor won’t ask for that, because the donor doesn’t know the most effective way to achieve his or her goals. The people who work every day in the field of child poverty know that.

That’s us - the charitable professionals.

The very real, but rarely done, work of donor stewardship

It’s our job to be the bridge between the well-intentioned motivations of donors and the realities of making an impact. We are the ones with the scholarship, the experience, and the expertise.

It’s our job to point out misconceptions, tactfully work with donors, help them invest in things that will achieve what they really want, and then keep them informed about the results.

Donors are not stupid, but they are often the victims of fundraising practices that try to keep them happy (and giving) at the expense of openness and honesty. Charitable professionals will often go along with their wishes, even if they know it's not the best use of resources, because to do otherwise would put funds at risk. This is, frankly, patronizing and irresponsible behaviour.

Dan Pallotta explained why in an excellent recent post called “Stop Giving Donors What You Think They Want” http://blogs.hbr.org/pallotta/2011/02/stop-giving-donors-what-you-th.html

I know very well it’s not easy to tell an enthusiastic donor what he/she wants to do is not the best way to achieve results, and it may lose you some donors in the short run.

I recently had a very sobering experience with a major donor who was convinced that research and impact evaluation are a waste of time and money. There are some very popular, very stubborn, and very emotionally charged misconceptions out there about charity.

But, despite the challenges, honesty is a far more respectful and engaging approach - one that will build trust and loyalty in the long run. Donors are not children. They deserve to know the truth.

Charity experts have to stop discussing how to work around donors to get things done, as if making donors happy and doing good are goals at odds with each other. Instead, we have to start involving donors in discussions about how to get things done. That may mean revealing we haven't got all the solutions figured out yet. It may mean sharing our failures as well as our successes.

And it may mean challenging donors' assumptions about things they feel sure about, which will be hard.

But if it's done well, it will produce more satisfying results for the donor AND for society.

After spending several years as a fundraiser, Nadine Riopel realized that the greatest potential to improve the relationship between donors and charities lies with the donors themselves. Through writing, speaking, and consulting, she now works to help donors make their giving more effective and rewarding. Nadine's email address is nriopel2@gmail.com. Her GiveSmart Blog can be accessed through her website www.givesmart.ca

THE LAST WORD

Farewell and welcome

Legacy giving specialist **Helen DeBoer-Daggett** will assume the role of Editor of ***Hilborn's Gift Planning in Canada***, following the retirement of the current Editor, **John Webster Hochstadt**.

"Readers of *Canadian Fundraising & Philanthropy* and its e-news versions will miss John's periodic incisive contributions to those publications, but not nearly as much as *Gift Planning in Canada* subscribers will miss his analysis, commentary and expert leadership," says Hilborn's President Janet Gadeski.

Helen, who will take on John's duties in July, currently works at **Norfolk General Hospital Foundation** as the director of development. Formerly, she was director of legacy giving at **Hamilton Health Sciences Foundation**.

Helen is well known among gift planning professionals. She has been a faculty member for the **Canadian Association of Gift Planning**'s week-long training program since 2007, presents frequent seminars and conference sessions, and serves on the CAGP Education Committee. She is also a member of the **Association of Fundraising Professionals** and volunteers locally with the **Rotary Club of Simcoe**.

Helen is an advocate of donor centered fundraising and views her profession as the best career one can have. She looks forward to her new role with ***Gift Planning in Canada*** as a means to create her own legacy of knowledge and inspiration for the profession she loves.

If you're looking for me after July 1st, Sitka Alaska might be a good place to start.
JWH (webster@jrtwave.com)

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