

# Focusing Client Intentions: Planning, Processes, and Passion

## Selected Bibliography & Resources

### 1. Studies

- A. *Doing Well by Doing Good*, published by The Philanthropic Initiative, Inc. (“TPI”), available at <http://www.tpi.org>.
- B. *The Donor Advisor: The Critical Role of the Advisor in Family – Philanthropy*, published by the National Center for Family Philanthropy (“NCFP”); available at <http://www.ncfp.org/advisor-main.html>.
- C. *“Doing Well by Doing Good In California—Improving Client Service, Increasing Philanthropic Capital: The Legal and Financial Advisor's Role”*, also at the TPI site (under Promoting Philanthropy/Advisor Resources).
- D. *What California Donors Want – In their Own Voices*, also at the NCFP site.
- E. *The Allianz American Legacies Study*, <https://www.allianzlife.com/MediaCenter/AmericanLegacies.aspx>

### 2. Books and Other Publications

- A. Fithian, Scott C., *VALUES-BASED ESTATE PLANNING: A STEP-BY-STEP APPROACH TO WEALTH TRANSFER FOR PROFESSIONAL ADVISORS* (John Wiley & Sons, Inc. 2000).
- B. Link, E.G., “Jay”, *FAMILY WEALTH COUNSELING: GETTING TO THE HEART OF THE MATTER*, (Professional Mentoring Publishers 1999).
- C. Livingston, Richard & Linda, *SMART & CARING: A DONOR’S GUIDE TO MAJOR GIFTING* (Self Published 1999).
- D. Gaudiani, Claire, *THE GREATER GOOD: HOW PHILANTHROPY DRIVES THE AMERICAN ECONOMY AND CAN SAVE CAPITALISM* (Henry Holt & Co. 2003)
- E. *The Journal of Practical Estate Planning* (CCH Publication, Bi-monthly periodical)
- F. Related and of interest:
  1. Greiff, Barrie Sanford *LEGACY: THE GIVING OF LIFE’S GREATEST TREASURES* (HarperCollins 1999).
  2. Hallowell, Edward M., M.D., *CONNECT* (Pantheon 1999).
  3. Stanley, Thos. J. and Danko, William D. *THE MILLIONAIRE NEXT DOOR* (Simon & Schuster 1996)



4. Baines, Barry K. ETHICAL WILLS: PUTTING YOUR VALUES ON PAPER (Perseus Publishing 2002).
5. Riemer, Jack & Stampfer, Nathaniel, SO THAT YOUR VALUES LIVE ON—ETHICAL WILLS AND HOW TO PREPARE THEM (Jewish Lights Press 1991).
6. Collier, Charles W., WEALTH IN FAMILIES (Harvard University Press 2001).
7. Gary, Tracy & Kohner, Melissa, INSPIRED PHILANTHROPY(2<sup>nd</sup> Ed. Jossey-Bass 2002).
8. Maister, David, Green, Charles, & Galford, Robert, THE TRUSTED ADVISOR (Touchstone Books/ Simon & Schuster 2000)
9. Kline, Nancy, TIME TO THINK (Ward Lock Books 2001)
10. McCarthy, Kevin W., THE ON-PURPOSE BUSINESS, (Pinon Press 1998)
11. Williams, Roy & Preisser, Vic, PHILANTHROPY HEIRS & VALUES (Robert D. Reed Publishers 2005)
12. Rafferty, Renata J., DON'T JUST GIVE IT AWAY: HOW TO MAKE THE MOST OF YOUR CHARITABLE GIVING (Chandler House Press 1999)
13. Festen, Marcia & Philbin, Marianne, HOW EFFECTIVE NONPROFITS WORK (Forum of Regional Associations of Grantmakers 2002)
14. Clinton, Bill GIVING (Knopf 2007)

**3. Web Sites**

A. The Connecticut Council for Philanthropy provides a “Why, Who, When and How” site to assist advisors in working with clients. It has a wonderful bibliography and list of resources. <http://www.ctphilanthropy.org/pages/advisors>.

B. "The Art of Charitable Planning," is a free, web-based guide for professional advisors, donors, and development professionals, created to help identify creative solutions that will help to solve estate, tax, and financial problems and meet philanthropic objectives, so as to enhance the conversation about philanthropy between advisors and clients.

<http://www.baltimoregivingproject.org/homepage2357> or  
<http://www.donorsforumsf.org>.

C. Planned Giving Design Center's site is worth bookmarking for anyone interested in planned gifts. The articles are excellent and the information available is extremely useful to advisors. Membership in the Planned Giving Design Center is free of charge, but registration is required to access their material. For example, a two part article appearing in the Gift Planner's Digest on 8/25/1999 and 8/31/1999 and entitled “Interviewing the Affluent: Unpacking

- Philanthropic Values and Motivations”, in particular discusses this method of planning with client. [www.pgdc.net](http://www.pgdc.net).
- D. The Giving Forum is the New Ventures Site and the national site for the Forum of Regional Association of Grantmakers, and has a complete listing of resources for advisors and donors alike. <http://www.givingforum.org>.
- E. Related and of interest:
1. Council on Foundations ([www.cof.org](http://www.cof.org)), most particularly check the Philanthropic Advisors Network.
  2. National Center for Family Philanthropy ([www.ncfp.org](http://www.ncfp.org))
  3. Ethical Wills [www.ethicalwill.com](http://www.ethicalwill.com)
  4. Advisors in Philanthropy [www.advisorsinphilanthropy.org](http://www.advisorsinphilanthropy.org)
- 4. Professional Training including Values and Planning**
- A. SunBridge Strategies. Orlando: Scott Farnsworth
  - B. Legacy Advisory Associates, Boston:
  - C. Resonate, Inc., Cincinnati: Barbara Culver
  - D. Philanthropy Coach, Providence, RI: Jay Steenhuysen

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[www.theadvisorsproject.com](http://www.theadvisorsproject.com)