

Frank Minton – “*Reading the Tea Leaves*”

Description: This session, using the analogy of tea, first looks briefly at how planned giving has developed. Then it projects how planned giving is likely to change in five areas: donor relations, technology, marketing, gift instruments, and professional qualifications. In each instance it offers suggestions for adapting to the changes.



Frank Minton founded Planned Giving Services, a national consulting firm that was acquired by PG Calc in 2005. Before entering consulting in 1991, he spent over ten years with the University of Washington, where he served as Director of Planned Giving and Executive Director of Development. He has served both as conference chair and board chair of the National Committee on Planned Giving (now the Partnership for Philanthropic Planning) and received its distinguished service award. He is a recognized expert on gift annuities and has served as chair of the American Council on Gift Annuities from which he also received a distinguished service award. He is the principal author of *Charitable Gift Annuities: the Complete Resource Manual*, the co-author of *Planned Giving for Canadians*, and has made many presentations and published numerous articles on gift planning. A number of his presentations have been to Canadian audiences, and his writing and consultation also deal with cross-border charitable gifts. He is on the advisory board of *Planned Giving Today*, and is a member of the Seattle Estate Planning Council, and the Washington Planned Giving Council.