Philanthropic Planning Paralysis:
Getting Donors to Act

When evaluating philanthropic planning advice, many donors often find themselves paralyzed from taking any action. How do you determine the optimal philanthropic solutions that accomplish a donor's objectives, communicate sophisticated planning strategies in a manner that is easy to understand, and motivate a donor to implement those strategies? This seminar provides concrete methods for you to help donors move beyond anxiety and confusion and take action – even in an environment of ongoing market volatility and economic uncertainty.

Agenda:

Part I – 15 Minutes
- How can you help donors recognize and articulate their own wealth planning needs and philanthropic desires?

Part II – 20 Minutes
- How should you communicate with donors so that they better understand the strategies and solutions for charitable giving?

Part III – 20 Minutes
- What can you do to motivate donors to take action now and avoid the cost of procrastination?

Part IV – 5 Minutes
- Q&A

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As a national wealth strategist at BNY Mellon, Justin Miller works collaboratively with other advisors to provide comprehensive wealth planning advice to clients and their families. He also is an adjunct professor at Golden Gate University School of Law, a Fellow of The American College of Trust and Estate Counsel (ACTEC), and a sought-after speaker for tax, estate planning and family governance topics at major conferences throughout the country. In addition, Mr. Miller has published numerous articles, and he is frequently quoted as an industry expert in the media. He received a master of laws in taxation and a juris doctor from New York University School of Law and a bachelor's degree, with honors, from the University of California at Berkeley.

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