



July 9, 2009

Dear Assembly Delegate:

The Partnership for Philanthropic Planning is grateful for council and individual support of our mission and programs. Voluntary giving has made the difference in our ability to expand and improve services that bring value to you in your daily practice. We hope you and your council will consider making a gift to the Partnership this year in support of our work toward *charitable giving made most meaningful*.

You and your council members can take pride in the ways that your support is leveraged to benefit the entire philanthropic planning community. During this year's business meeting you will hear about a few of the special efforts and projects undertaken by the Partnership on our behalf.

- The second edition of **Guidelines for Reporting and Counting Charitable Gifts** is being used by charities nationwide and has received the endorsement of the Association of Fundraising Professionals and the Association of Philanthropic Counsel.
- An interactive **philanthropic planning web e-community**, bringing the resources, advice, and mentoring of thousands of your colleagues to your desktop 24/7.
- A **best practices guide to insurance** use in charitable giving will be completed this year, a companion to PPP's **Charitable Life Insurance Evaluation Guidelines**, providing even more guidance as you evaluate charitable insurance programs.
- PPP is the lead organization promoting a **permanent and expanded IRA Charitable Rollover**. PPP's proactive advocacy was instrumental in reinstating the current Rollover and we are leading the effort to expand the provision to include rollovers to split-interest charitable vehicles.
- The Partnership has been **speaking on your behalf to Congress and the IRS** on issues as far-reaching as revisions to form 990 and the patenting of charitable tax strategies. PPP is in the forefront of conversations on **charitable reform** measures.
- PPP is currently working **building partnerships** with organizations whose members are part of the philanthropic planning team, and continuing to promote the charitable gift planning message through **research and media promotion**.

Many councils have added a special dimension to their gifts by structuring them in one or more of the following ways:

- Gifts to honor a speaker (in lieu of honorarium).
- Gifts to honor an important council leader, a retiring council member, or in recognition of a council award.
- Gifts to fund a particular Partnership project or a specific activity like government relations or research.
- Gifts to support NCPG's activities that serve councils, such as the Council Leaders Workshop or strategic planning assistance.

Many individuals have designated their gifts to particular areas:

- **Unrestricted (special projects):** As you know from your own experience, these are the most helpful gifts. The Board of Directors will direct these funds to the areas where they are most needed. By providing funds for special projects your gifts help the Partnership respond to immediate needs and issues.
- **Designated gifts:** You may designate your gift to any area of PPP's programs, such as government relations, research, or education for example.
- ***Planned Giving Today's PPP Operations Endowment:*** Through a generous gift from *Planned Giving Today* and its publisher, G. Roger Schoenhals, the Partnership is building an endowment for future operations. The rapid expansion of the gift planning profession makes it difficult to predict how our members' needs may develop. Your operations endowment gift will help PPP move confidently into the future.
- **Palisca Keitel Leadership Endowment:** This endowment, created by former board member Elizabeth Keitel, provides funds to help train and support the PPP leaders of today and the future.
- **PPP Endowment:** The Partnership has created a board-designated endowment to provide on-going support to activities in key areas. Your endowment gift will help provide resources for these areas in the future.

We will be recognizing our Partnership donors for 2009 at the National Conference on Philanthropic Planning in October, if your gift or pledge is received prior to September 1. All gifts are welcome. Councils and individuals who give \$1,000 or more during the calendar year are recognized in our Charles Johnson Fellows giving category.

Thank you for your continued support of the Partnership for Philanthropic Planning.

Sincerely,

Rob Buchheit, PPP Board of Directors
Chair, PPP Development Committee
Assistant VP for Development/Gift Planning
University of North Texas