



## ***The Journal of Gift Planning***®

### **Author's Guidelines**

#### **Unsolicited Manuscripts**

Unsolicited manuscripts are accepted for consideration by the Editorial Advisory Committee. Send outlines and manuscripts to Editor, *The Journal of Gift Planning*, Partnership for Philanthropic Planning, 233 McCrea St., Suite 400, Indianapolis, IN 46225. FAX (317)269-6268. E-mail [byeager@pppnet.org](mailto:byeager@pppnet.org). Manuscripts are considered with the understanding that they have not been previously published and are not under consideration by another publication.

#### **General Policy Statement**

All manuscripts, both solicited and unsolicited, are submitted to two members of the editorial review panel for a blind review. Manuscripts are evaluated on their quality and appropriateness for *The Journal of Gift Planning*, based on technical accuracy, professional relevance and the publisher's general statement of purpose. It is the policy of *The Journal of Gift Planning* that all questions and disputes arising from anything submitted to, or published by, the Partnership for Philanthropic Planning will be brought to the editor. All decisions rendered by the editor will be final.

#### **Ethics**

The Partnership endorses the *Model Standards of Practice for the Charitable Gift Planner* (see below) and seeks to promulgate those standards throughout the gift planning community. Authors should consider the Standards in the context of their article and, if appropriate, develop a sidebar highlighting ethical concerns or issues raised.

#### **Editing**

All accepted manuscripts will be edited according to The Journal's style, using the AP Stylebook. All editing decisions made by the editor will be final. Authors will have an opportunity to review edited articles before publication. Authors are responsible for all statements made in their work.

#### **Requirements—Unsolicited Proposals for Articles**

Submit an outline (no more than four pages) along with a writing sample, author's complete address, telephone and fax numbers and e-mail address, and a one-paragraph biography (longer bios will not be considered). Indicate or include illustrative materials (for example, charts or graphs) that are available that might enhance the article. **Limit charts and graphs to no more than three per article and no more than 25 endnotes.**

#### **Requirements—Manuscripts**

If your proposal is accepted, a deadline for the final manuscript will be assigned. At the copy deadline, please e-mail a file of your article, single-spaced, using one-inch margins on all sides, no indents of paragraphs with a minimum use of bold, italic and underline. **Endnotes**

**should be used rather than footnotes and all references must be complete. Notes should be numbered with Arabic rather than Roman numerals.**

Manuscripts should be 4,000 to 6,000 words in length. Longer or shorter articles should be approved by the editor.

Authors receive no remuneration or reimbursement for any expenses incurred in conjunction with the preparation of articles.

While there is no guarantee of publication, the Partnership for Philanthropic Planning carefully considers each manuscript associated with fundraising and its related fields. Membership in the Partnership and/or its affiliated planned giving councils is not a prerequisite. Co-authorship is permitted. Manuscripts may not endorse any product or service. The editor reserves the right to solicit articles.

Under the terms of the copyright law, all authors must complete and return a permission to print form. This form is sent to authors upon acceptance of a manuscript for publication and must be returned prior to publication.

First publishing rights of all accepted manuscripts become the permanent property of the Partnership for Philanthropic Planning, as well as the right to create derivative works.

Authors are responsible for securing any permission for reuse of previously copyrighted work and will supply copies of appropriate copyright releases to the Partnership at the time of acceptance.

### **Evaluation of Manuscripts**

Before publication, all manuscripts will be subjected to blind review by at least two members of the Editorial Review Panel. The panel will evaluate the manuscript according to the following criteria:

1. Is this manuscript of current interest and important to a reasonable segment of fundraisers?
2. Is the topic of the manuscript considered important in its own field of specialization?
3. Is this manuscript accurate? Thorough? Technically sound? Well organized?
4. Are technical terms accurate in spelling and usage? Are they used correctly throughout the manuscript?
5. Is there unnecessary duplication of material in the text and charts or tables?
6. Does the manuscript offer something of practical value to its audience?
7. Does the manuscript offer enough new information concerning the problem or situation being discussed?
8. Does the manuscript's length meet the needs of its topic, or should it be shorter or longer?
9. Do the author's interpretations or conclusions logically and validly follow the discussion?
10. If applicable, are the references adequate? Do they support statements made in the text? Could any be eliminated?
11. If appropriate to the topic, did the author observe ethical standards in the treatment of subjects?

12. Could this manuscript be construed in any way as an advertisement for a product or service?
13. What corrections, changes or comments should the author consider, if any, before this manuscript is published?
14. Finally, should this manuscript be published in *The Journal of Gift Planning*?

**Publisher's Statement of Purpose:** *The Journal of Gift Planning* is provided to members of the Partnership for Philanthropic Planning as a benefit of membership. The publication is intended to facilitate and encourage the education and training of the philanthropic planning community.

## **Model Standards of Practice for the Charitable Gift Planner**

### **PREAMBLE**

The purpose of this statement is to encourage responsible gift planning by urging the adoption of the following Standards of Practice by all individuals who work in the charitable gift planning process, gift planning officers, fund raising consultants, attorneys, accountants, financial planners, life insurance agents and other financial services professionals (collectively referred to hereafter as "Gift Planners"), and by the institutions that these persons represent.

This statement recognizes that the solicitation, planning and administration of a charitable gift is a complex process involving philanthropic, personal, financial, and tax considerations, and as such often involves professionals from various disciplines whose goals should include working together to structure a gift that achieves a fair and proper balance between the interests of the donor and the purposes of the charitable institution.

### **I. PRIMACY OF PHILANTHROPIC MOTIVATION**

The principal basis for making a charitable gift should be a desire on the part of the donor to support the work of charitable institutions.

### **II. EXPLANATION OF TAX IMPLICATIONS**

Congress has provided tax incentives for charitable giving, and the emphasis in this statement on philanthropic motivation in no way minimizes the necessity and appropriateness of a full and accurate explanation by the Gift Planner of those incentives and their implications.

### **III. FULL DISCLOSURE**

It is essential to the gift planning process that the role and relationships of all parties involved, including how and by whom each is compensated, be fully disclosed to the donor. A Gift Planner shall not act or purport to act as a representative of any charity without the express knowledge and approval of the charity, and shall not, while employed by the charity, act or purport to act as a representative of the donor, without the express consent of both the charity and the donor.

### **IV. COMPENSATION**

Compensation paid to Gift Planners shall be reasonable and proportionate to the services provided. Payment of finder's fees, commissions or other fees by a donee organization to an independent Gift Planner as a condition for the delivery of a gift are never appropriate. Such payments lead to abusive practices and may violate certain state and federal regulations. Likewise, commission-based compensation for Gift Planners who are employed by a charitable institution is never appropriate.

## **V. COMPETENCE AND PROFESSIONALISM**

The Gift Planner should strive to achieve and maintain a high degree of competence in his or her chosen area, and shall advise donors only in areas in which he or she is professionally qualified. It is a hallmark of professionalism for Gift Planners that they realize when they have reached the limits of their knowledge and expertise, and as a result, should include other professionals in the process. Such relationships should be characterized by courtesy, tact and mutual respect.

## **VI. CONSULTATION WITH INDEPENDENT ADVISORS**

A Gift Planner acting on behalf of a charity shall in all cases strongly encourage the donor to discuss the proposed gift with competent independent legal and tax advisers of the donor's choice.

## **VII. CONSULTATION WITH CHARITIES**

Although Gift Planners frequently and properly counsel donors concerning specific charitable gifts without the prior knowledge or approval of the donee organization, the Gift Planners, in order to insure that the gift will accomplish the donor's objectives, should encourage the donor, early in the gift planning process, to discuss the proposed gift with the charity to whom the gift is to be made. In cases where the donor desires anonymity, the Gift Planners shall endeavor, on behalf of the undisclosed donor, to obtain the charity's input in the gift planning process.

## **VIII. DESCRIPTION AND REPRESENTATION OF GIFT**

The Gift Planner shall make every effort to assure that the donor receives a full description and an accurate representation of all aspects of any proposed charitable gift plan. The consequences for the charity, the donor and, where applicable, the donor's family, should be apparent, and the assumptions underlying any financial illustrations should be realistic.

## **IX. FULL COMPLIANCE**

A Gift Planner shall fully comply with and shall encourage other parties in the gift planning process to fully comply with both the letter and spirit of all applicable federal and state laws and regulations.

## **X. PUBLIC TRUST**

Gift Planners shall, in all dealings with donors, institutions and other professionals, act with fairness, honesty, integrity and openness. Except for compensation received for services, the terms of which have been disclosed to the donor, they shall have no vested interest that could result in personal gain.

*Adopted and subscribed to by the National Committee on Planned Giving and the American Council on Gift Annuities, May 7, 1991. Revised April 1999*