

**1. PPP is the voice of charitable gift planning.**

PPP is recognized by gift planners, the media, legislators, regulators, fundraisers and nonprofit administrators, allied professional organizations and other key constituents as the spokes-organization for charitable gift planners and the standard setter for charitable gift planning.

**The end is achieved when:** PPP guidelines and standards are widely used by gift planners and well respected by outside constituencies. PPP is the first place that gift planners, the media, legislators, regulators and other influence-makers go for information on charitable gift planning. PPP is always consulted when legislation or regulation affecting charitable planning is considered.

**2. Charitable gift planning is widely recognized as bringing value to charitable organizations and estate planning practices.**

Charitable gift planning is recognized and respected by the public, donors, charities, professional advisors, media and government as a professional expertise. The public recognizes the term “charitable gift planner.”

**The end is achieved when:** Donors and advisors include and value gift planners as a part of their financial and estate planning teams. Charities include and value gift planners as a part of their development teams. Membership in PPP is recognized as evidence of commitment to gift planning professionalism.

**3. Charitable gift planning is widely practiced.**

Americans at all income and asset levels make planned gifts. Every fundraiser and donor advisor has at least a basic familiarity with planned giving options and presents these options to all donors, prospects and clients.

**The end is achieved when:** The number of planned gift donors is equal to the number of people who support charity during their lifetime. Charitable organizations are able to measure a steady increase in the number of planned gifts committed and realized. All donor advisors ask clients about their philanthropic goals.

**4. Charitable gift planners are well-trained and competent.**

Fundraisers and donor advisors plan charitable gifts competently and ethically. Donors feel confident in gift planners and satisfied with their gift planning experience.

**The end is achieved when:** There is general agreement regarding the skills, knowledge and experience required for competence in gift planning. Fundraisers and donor advisors have a wide variety of options for acquiring and maintaining skills,

knowledge and experience. The number of public complaints about poorly structured gift plans or incompetent/unethical gift planners steadily decreases.

**5. Local planned giving councils are vibrant, healthy and well-supported by PPP.**

PPP and its affiliated planned giving councils work together to forward the mission of the organization. PPP councils have a reputation for organizational excellence because of their leadership infrastructure, program quality and community involvement.

**The end is achieved when:** Both the number of planned giving councils and the number of council members is steadily increasing, and at least 75% of members belong to both a local council and PPP. Councils rate PPP services as essential to their leadership infrastructure, program quality and community outreach. All councils have strong participation by both nonprofit and for-profit gift planners.