

# **Nine Career and Life Lessons Learned after 25 Years in the Fundraising Trenches... aka Planned Giving Comedy Hour**

Bryan Clontz, Ph.D., CFP<sup>®</sup>, CAP<sup>®</sup>  
President - Charitable Solutions, LLC  
[bryan@charitableolutionsllc.com](mailto:bryan@charitableolutionsllc.com)

# **Top 10 Characteristics for Opening Keynote Speaker Selection**

- 1. For a Jewish Legacy Conference Keynote, the main thing we need is a gentile**
- 2. Must have extensive for-profit and non-profit experience (primarily in planned giving)**
- 3. Must have been born in the latter half of 1970**
- 4. Must have a Ph.D. in a financial planning discipline, concentrate all research on charitable planning and be a CFP® designee**
- 5. Must have taught financial planning at a university in Georgia**
- 6. Must have been married 23-25 years, have exactly 2 children and both must be girls between 11-18**
- 7. Must have already spoken on the same topic in Phoenix within a week of our Life and Legacy Conference and must be traveling to Alaska in the next 45 days**
- 8. Must be on the compulsive end of frugal (cheap)**
- 9. Must be between 5'8" and 5'9"**
- 10. Must have male pattern baldness and/or a rapidly receding hairline**

**RUN REPORT**

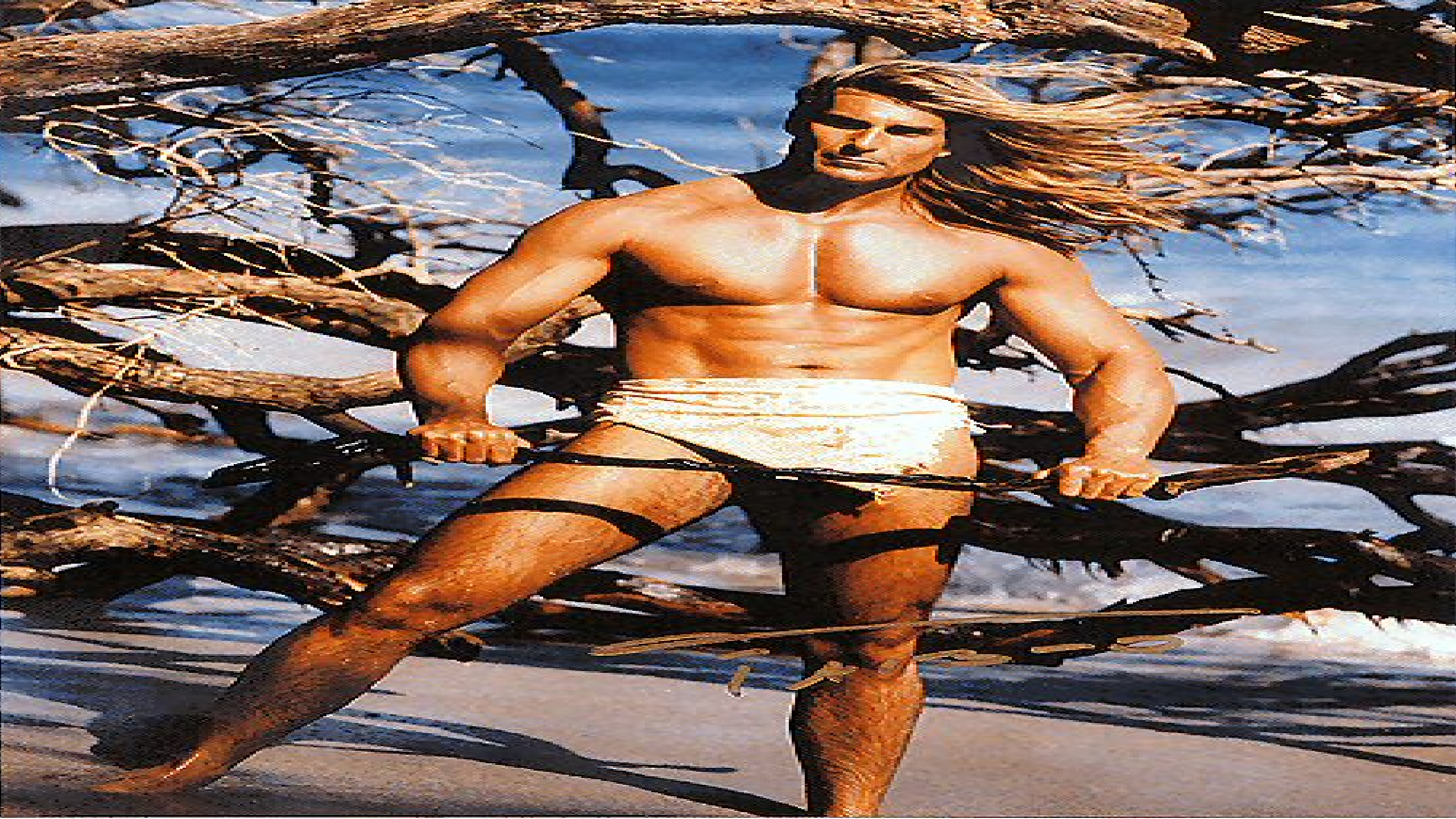


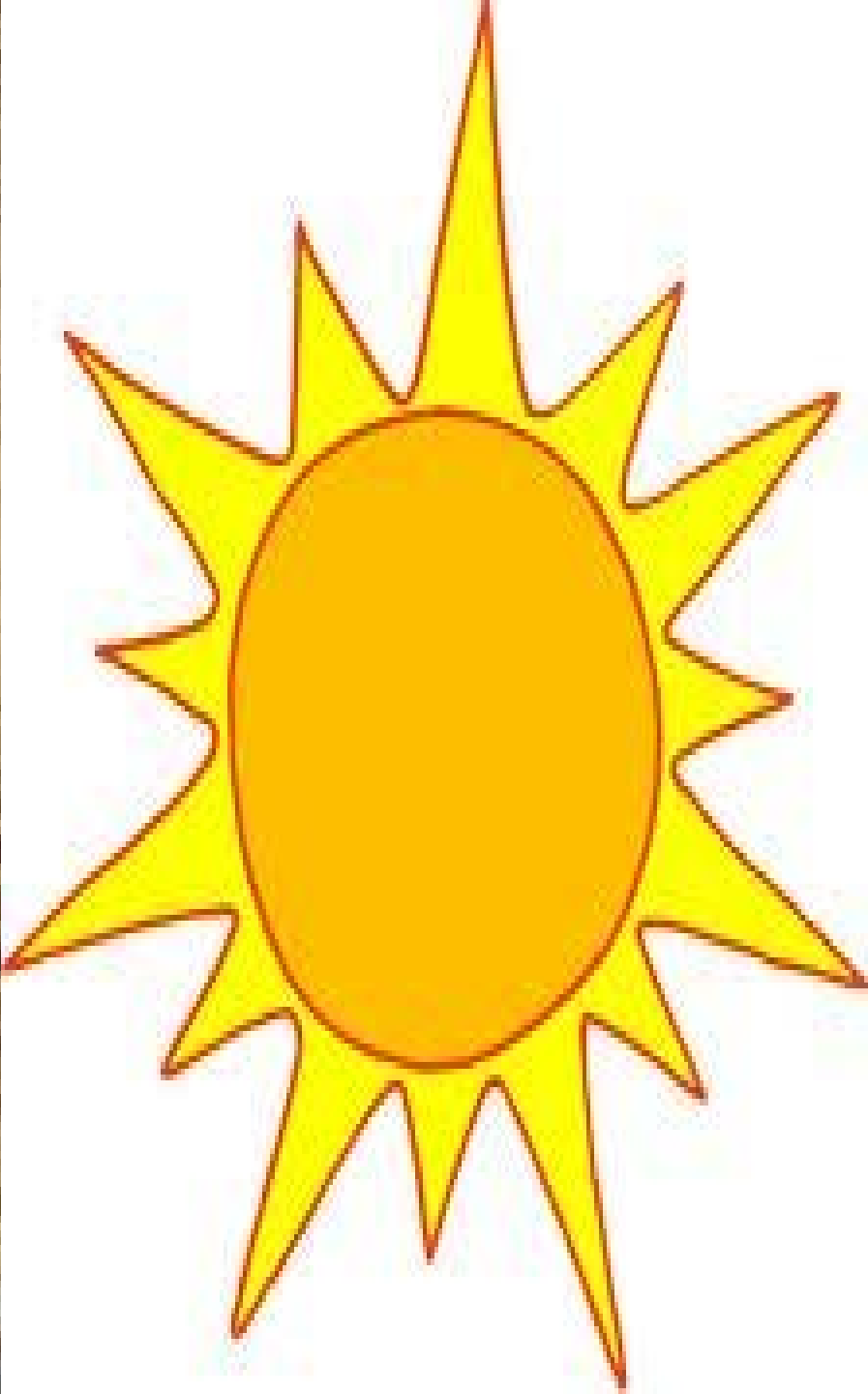
Tie-breaker characteristic: We need someone who gets winded transferring from couch to recliner **in the same room**, and also will not overly stress attendees with meaningful and actionable information in the first session.



*Peace On Earth*  
GOOD WILL TOWARD MEN

*Butch & Kathy*





***“Twenty years from now, you will be more disappointed by the things that you didn't do, than by the ones you did do.”***

Mark Twain

***“Sometimes the greatest risk... is not taking one.”***

AIG Insurance Commercials

# **Lesson Learned #1**

**Embrace Prudent Risk-Taking:  
Your Life and Career are Risky, But  
Probably Not Where You Think!**



# **Lesson Learned #2**

**Be Creatively Opportunistic –  
Understand the Problem and  
Create a Solution!**

# Legacy Society Songs: Thumbs Up/Thumbs Down Test

- *If You Want Blood, You've Got It – AC/DC*

American Red Cross

- *Who Let the Dogs Out – Baha Men*

University of Georgia or SPCA

- National Society of Agnostics, Atheists and Non-Believers

*Stairway to Heaven – Led Zeppelin*

*or perhaps... Highway to Hell – AC/DC*

# Lesson Learned #3

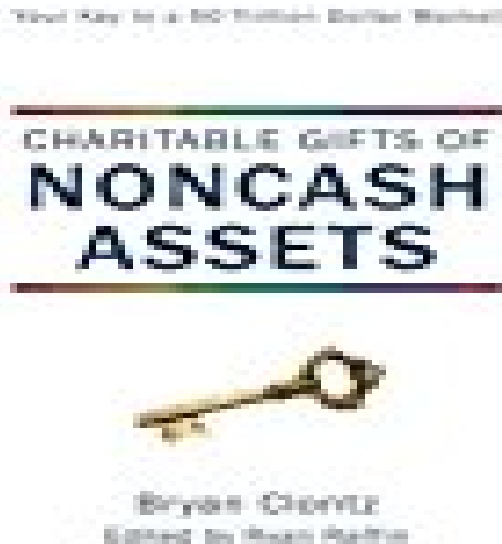
*Find Out What You Don't Do Well,  
and Then, Don't Do That Thing!*

**The Most Interesting Man in  
the World – Dos Equis Beer  
Commercial**

# #1 Amazon Best Seller!!!

Amazon Best Sellers Rank: #1 in [Books > Business & Money > Small Business & Entrepreneurship > Nonprofit Organizations & Charities > Fundraising > Charitable Tax Planning > Planned Giving > Noncash Assets > Bald, North Florida Based Authors](#)

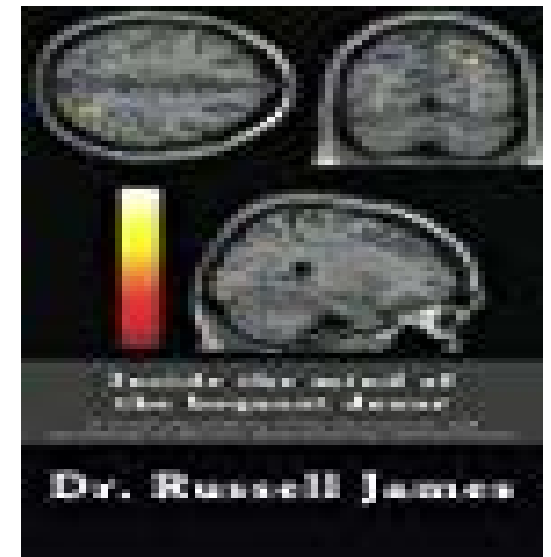
Frequently bought together:



+



+



# Book on Oprah's Favorite Things!



# #1 Book Club Selection in 2018!!

I laughed, I cried and I came away viewing asset opportunities differently!

This book touched my soul! My mom said it was the best Mothers Day gift she ever received!

Both of my kids were assigned this for summer reading – they said they couldn't put it down!







**STOP**



# **Lesson Learned #4**

**Just When You Think You Know  
Everything, You Don't!**



# Formal terms lower charitable interest

2014 Survey, 1,246 Respondents, Groups D/E

Interested  
Now

**23%**

Make a gift to charity in  
my will

Will Never  
Be  
Interested

**12%**

**12%**

Make a **bequest** gift  
to charity

**14%**

# **Lesson Learned #5**

**Keep it Simple!!!!!!!!!!!!!!**

**Part 1: Don't Ever Talk with Your IT  
Person About Anything!**

**Part 2: Stop Getting Ready to Get  
Ready!**

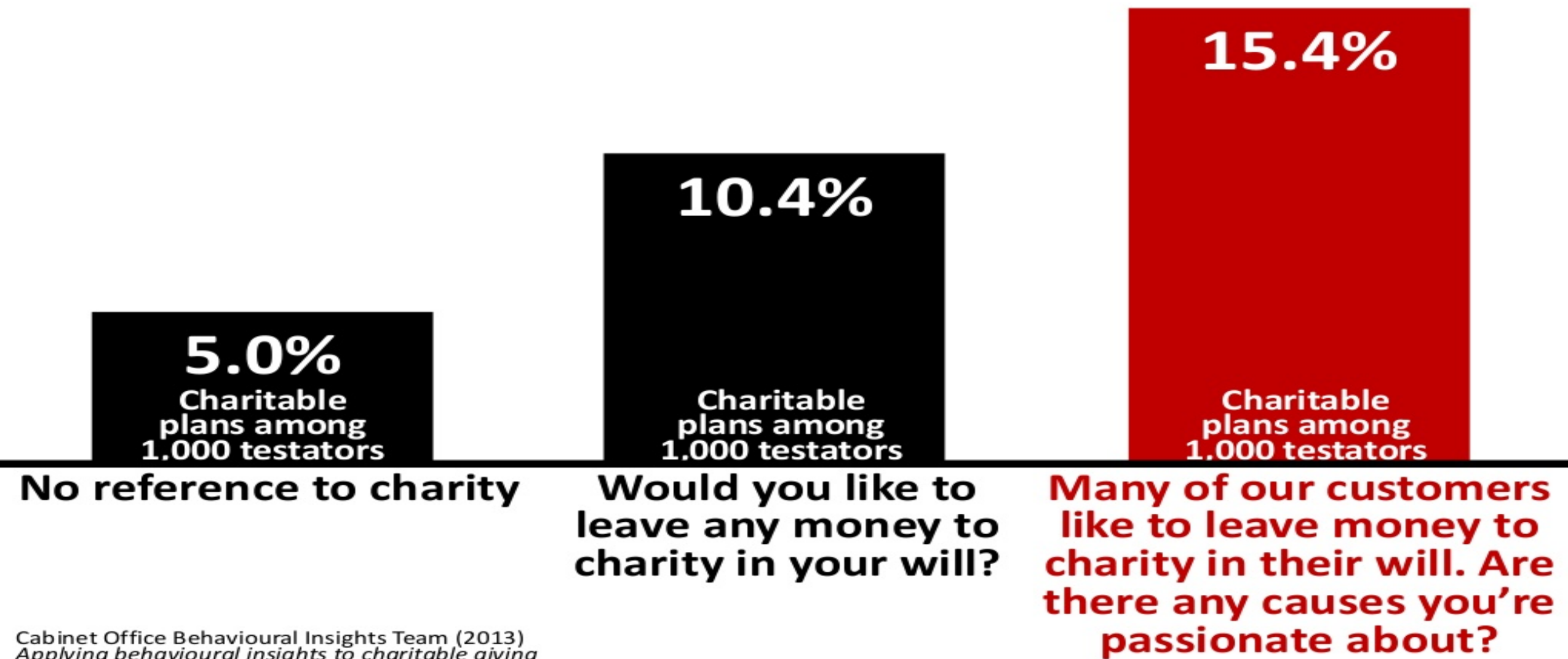




# **Lesson Learned #6**

**Common Sense Isn't as Common  
as You Might Think!**

# Charitable bequests are influenced by a simple social example





# **Lesson Learned #7**

**Our fellow humans are lazier and more manipulable than you ever imagined!**



# **Lesson Learned #8**

**Practice telling stories, stories and stories - If you aren't telling your story, someone else is... and that won't end well. Keep it simple, but have a hook!**

# Our Family Tree



Blank space for writing names in the top-left section of the family tree chart.

Blank space for writing names in the top-right section of the family tree chart.

Father Wife Mother

Father Husband Mother

Wife's Brothers & Sisters  
Under Name

Husband's Brothers & Sisters  
Under Name

Children	Children	Children
Children	Children	Children
Children	Children	Children
Children	Children	Children

Children	Children	Children
Children	Children	Children
Children	Children	Children
Children	Children	Children

Wife's Maternal Aunt & Uncles  
Under Name

Children	Children
Children	Children
Children	Children
Children	Children

Wife's Maternal Aunt & Uncles  
Under Name

Children	Children
Children	Children
Children	Children
Children	Children

Our Children

Children	Children	Children
Children	Children	Children
Children	Children	Children
Children	Children	Children

Husband's Maternal Aunt & Uncles  
Under Name

Children	Children
Children	Children
Children	Children
Children	Children

Husband's Maternal Aunt & Uncles  
Under Name

Children	Children
Children	Children
Children	Children
Children	Children

# **Lesson #9**

**No matter what you do, you and I will be forgotten anyway probably sooner than we think. So don't get so hung up on your mistakes!**