



Planned Giving—the Grand Adventure

BY JILL MUEHRCKE

At last, a reader-friendly book that captures the essence of planned giving.

On My Way in Planned Giving

By G. Roger Schoenhals. 128 pages. Softcover.

*Available through the Society for Nonprofit Organizations' Resource Center,
6314 Odana Road, Suite 1, Madison, Wisconsin 53719 (800-424-7367).*

"Pooled income funds had something to do with swimming. Gift annuities involved Christmas. And charitable remainder unitrusts reminded me of division problems in math class.

"And furthermore, the term 'planned gibbing' sounded a bit fishy to me."

This description captures the vague impression many of us have about planned giving. Luckily, we will never again be in the dark, thanks to G. Roger Schoenhals' delightful book, *On My Way in Planned Giving*. When he became a planned giving practitioner in 1986, he explains, he was "so green, a golf course looked pale by comparison."

But since he was "getting weary of eking out a living as a freelance writer," he applied for the job. Quickly, he realized that planned giving was really about relationships. From his first day, he says, "I have tried to emphasize the relational skills that can make or break a planned giving officer."

Gift planning is a people-centered profession. As Schoenhals puts it, it's "people, people, people." He defines planned giving as "inspiring and enabling people to make tax-wise gifts that will benefit them inwardly as well as materially and that will further result in helping a worthy organization advance its mission in the world."

In 1990, Schoenhals launched *Planned Giving Today*, a newsletter for gift-planning professionals. Serving as editor and publisher, Schoenhals aimed to provide "a publication that would dwell on the practical aspects of planned giving—the people-related things."

The back page of *Planned Giving Today* is "the editor's place to pour a cup of coffee and talk shop with his readers." This column, called "On My Way," includes anecdotes and advice from Schoenhals' planned-giving experience. As he describes it, "Sometimes

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this column is a soap box for me to express my convictions. Sometimes it's a sand box to play in. And sometimes it's a lunch box where I tuck a tasty treat for the reader to take along the way."

In this book, he has collected 88 of the more popular pieces that appeared in "On My Way" during the first five years of publication. Written with sparkle and wit, these "articlettes" are a window on the life of the planned giving officer, showing the humor, agony, and elation of gift planning.

Although the intended audience is people involved in charitable gift plan-

ning, the book is valuable for the larger nonprofit community as well. It will be especially interesting reading for those who want to know more about this specialized area of fundraising.

Schoenhals explains it like this: "If you're a planned giving officer and a board member or family member or a professional advisor or a donor or even the person sitting next to you on the plane asks, 'What kind of work do you do?' you no longer have to confound them with oratorical contortions extolling the fine art of deferred giving and the awesome benefits of a net-income charitable remainder unitrust with make-up provision. Nor must you launch a 60-second crash course on the peculiarities, challenges and rewards of your esoteric work. Now you can simply hand them this book and say, 'Here, read this.'"

It's hard to imagine a book that would make the planned-giving field as reader-friendly as this one does. Part of the secret, of course, is that Schoenhals is a professional writer and uses words deftly. Part of it, too, is that he clearly loves his work. As he says, he "learned to salute the difficult questions because they taught me what I needed to know. They led me deeper, honed my thinking. . . ."

He urges those who are just getting their planned-giving feet wet to relish the questions. "Welcome them. Invite them. Put yourself in situations where questions will arise, where you are forced to learn. Let the questions be your pathway to learning.

"New letter rulings, different gift combinations, technical variations, marketing variations—there's plenty to keep all of us scrambling," he concludes. "This is part of our grand adventure." ■