

*A Message From*

**James C. Soft, CFP, M.A., M.S.**



**F**or most of my adult life I have been working full time in the charitable sector. Much of that time has been in the development area . . . more specifically in the facilitation, implementation, and administration of planned gifts.

There is nothing more gratifying than helping worthy charities serve their donors through the many benefits of charitable gift planning!

"A win, win, win situation" is the frequent donor summarization of a planned gift well designed!

The donor "wins" (saving taxes, often increasing spendable income and helping his favorite charitable cause), the charity "wins" (enjoying growth in their endowment, capital or current fund programs), and the government "wins" (because a healthy charitable sector ultimately lessens the burden of the government). There is even a fourth winner namely the allied professional advisor, inasmuch as introducing a charitable element into the financial/estate plan frequently becomes the "key" that brings about the solution for other planning concerns.

The planned giving arena is growing dramatically with the promise of an even more significant potential in the years ahead. Have you given adequate consideration to this growing industry? Rather than trying to become technically proficient overnight (in what is a rather complex and involved discipline) consider James C. Soft & Associates as your planned giving resource. You can benefit from JCS & Associates extensive experience in planned giving from program evaluation to program development.

JCS & Associates looks forward to helping you participate in the promotion of what has contributed significantly to America's greatness . . . namely a healthy and active philanthropic sector! Make sure you are taking advantage of those programs and tax policies that encourage charity.

## Experience...

- Over 3 decades in the charitable and planned giving sector
  - Consulting / Mentoring** charities with beginning to intermediate Planned Giving Programs
  - Educating** professionals and donors about the multiple benefits of Planned Giving
  - Integrating** charitable gift vehicles with comprehensive financial planning techniques
- President, Yellowstone Boys and Girls Ranch Foundation
- Master of Arts
- Master of Science
- CFP (Certified Financial Planner)
- Member of Governor's task Force for Endowed Philanthropy (Task Force primarily responsible for the passage of Montana's tax credit for endowed philanthropy law)
- Board member of Charitable Accord (national organization which promotes positive charitable tax policy on the federal level . . . primarily responsible for the passage of the "Philanthropy Protection Act of 1995" and the "Gift Annuity Anti-Trust Relief Act of 1995")
- Contributing author "Building An Endowment, Right From the Start" (Authors: Moerschbaeche, Hammerman and Soft)



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## Building Successful Planned Giving Programs

**JAMES C. SOFT**  
& Associates Consulting



## Mission Statement...

“To educate institutions, professionals, and donors regarding the multiple benefits of planned gifts.”

## Services Offered...

- Site visits for board & program analysis
- Educational Seminars
- Mentoring planned giving personnel
- Developing planned giving policies
- Guidance regarding investment policies
- Technical support for the administration of planned gifts
- “Turn-key” planned gift documentation
- Composing planned giving analyses & proposals
- Working with professional advisors & donors
- Phone consultation
- Providing financial/estate planning assistance to professional advisors (JCS & Associates does not engage in the practice of law. It does, however, provide specialized planned giving technical support to professionals)
- Head hunting & evaluating planned giving officers for institutions

“Serving institutions, professionals, & donors.”

## Seminars...

James C. Soft & Associates will help you stay current regarding the many rules and regulations pertaining to planned giving. We provide the necessary orientation regarding the role of planned giving in the charitable sector. We teach innovative ways planned gifts can provide solutions for tax, estate, and retirement planning concerns for donors...all of which leads to meaningful gifts to charity.

- Board & Administrative Development (2-8 hrs.)
- Donor Group Seminars (1-2 hrs.)
- Professional Seminars (1/2 day or full day...CPE)
- Montana Tax Credit For Endowed Philanthropy

*Seminars include digital slide presentation with accompanying handouts or manuals*

## Seminar Audiences...

- Boards & Staff of Charitable Organizations
- CPA Societies
- Legal Societies
- Estate Planning Councils
- Bank Trust Departments
- Life Underwriter Groups
- Investment Advisory Groups
- Donors

## Types of Charities...

- Social Service Agencies
- Private Schools
- Community Foundations
- Hospitals
- Churches
- Conservation Organizations
- Museums
- Theaters
- Colleges & Universities

## Cost of Services...

- Seminar fees negotiated
- Hourly rates begin at \$100 (seminars not included in hourly rates)
- Annual retainer contract provides clients with on-going assistance (fees to be decided subsequent to field/phone interview)
- Project fees negotiated individually (e.g. working with professionals and their clients in financial/estate analysis & design)

“Planned gifts provide unique solutions for financial & estate planning.”

