



A Planned Giving Resource

The Center for Planned Giving was established in November 2002 as an impartial philanthropic resource for nonprofit organizations, professional advisors and donors. Created through a partnership between the Community Foundation for Southern Arizona and Leave A Legacy Southern Arizona®, the Center for Planned Giving is dedicated to increasing planned and major gifts made to charitable organizations in Southern Arizona.

What it Offers

The Center's Free confidential services include:

- Confidential free consultations with professional advisors and their clients exploring the possibilities of planned giving
- Educational presentations for professional advisors
- Educational seminars for advisory members of nonprofit boards
- Preparation of gift illustrations and calculations
- Referrals to other services, including professional advisors working outside of your area of expertise
- A lending library of reference materials on planned giving
- On-line assistance through the Planned Giving Design Center at www.GiftPlanSoAZ.org, which includes descriptions of planned giving vehicles, tax and legislative alerts, IRS forms, rates and tables and articles by national experts



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What professional advisors say about the Center for Planned Giving...

William L. Asdell, Esq.
O'Connell & Associates, P.C.

"The Center for Planned Giving is a unique philanthropic resource in our community," says Bill Asdell, a local estate planning attorney, with a focus on charitable gift planning. He affirms the Center's contribution to the design and implementation of charitable gifting strategies for his donor clients.

"CPG is my partner in planning, and provides me with the practical expertise which optimizes the benefit I offer to donors and nonprofits alike. I count on CPG to provide me with the highest quality consultation as a free, professional, confidential and impartial service to our Tucson community."

Donna Byers, CPA
Clifton Gunderson LLP

Donna Byers, CPA says, "professional advisors who use the services of the Center for Planned Giving and the Planned Giving Design Center feel they add tremendous value to their client relationships."

Beth Bank
Merrill Lynch Financial Advisor

Beth Bank, financial advisor and nonprofit volunteer, comments about the services of the Center for Planned Giving. "Having access to the services of the Center provides financial advisors and nonprofits unique options and opportunities to raise philanthropic dollars and adds value for their clients and donors."