

WEBINAR PRESENTER



- Gregory J. Sharkey, J.D. Senior Philanthropy Advisor The Nature Conservancy
- Assists donors with a wide range of topics related to philanthropy including helping them to achieve their philanthropic, financial and estate planning goals through charitable giving
- Works with teams across the country on strategy for working successfully with top donors and prospects
- Prior to The Nature Conservancy, Sharkey worked for over 12 years at Denison University in the roles of Director of Planned Giving and Senior Development Officer
- Attorney at Sweeney, Sheehan & Spencer
- Graduate of Denison University and Villanova University School of Law
- Served on the board of the National Association of Charitable Gift Planners

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LIFE TRANSITIONS

1. RETIREMENT

"Are you thinking about retirement in some form? What does that look like?"

"How will retirement affect your philanthropy?"

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LIFE TRANSITIONS 2. SALE OF BUSINESS "What's the story of your business?" "What are your future plans for your business?"	
MISTELTER	Technique (WORD)
OTHER TRANSITIONS	

VALUES, MOTIVATIONS, AND FAMILY

4. INHERITANCE

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"Share the story of one gift that was particularly meaningful to you, and why?"



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CHARITABLE GIVING	PLATFORMS		
"Do you use charitable giving platforms like PFs and/or DAFs?"			
"What inspired you to create it?"			
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	THE FOTATE DI ANNINO		
	THE ESTATE PLANNING CONVERSATION		
1872	"Why have you been so generous to (our charity) over the years?"		
	"Would you consider naming (our charity) as a beneficiary of your estate		
	plans?"		
	Gifts of Retirement Plan Assets - Simple		
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TALK ABOUT ASSETS! "What's your take on the stock market?" "What's your investment philosophy/approach?" Don't assume donors know about double tax benefit. ■STELTER

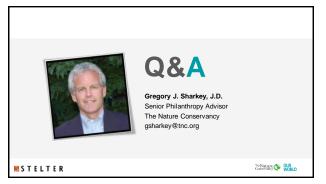
REAL ESTATE

"Where do you like to vacation?"

"Do you invest in real estate? How did you get into that?"



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ADDITIONAL QUESTIONS

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WEBINAR RESOURCES

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- The recording.
- · The presentation slides.

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