

The Nature Conservancy **Questions to Start Gift Planning Conversations**  
 Greg Sharkey, Senior Philanthropy Advisor | December 12, 2017

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**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?"

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## OTHER TRANSITIONS

### 3. LOSS OF FAMILY MEMBER OR PERSONAL ILLNESS

### 4. INHERITANCE

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## VALUES, MOTIVATIONS, AND FAMILY

"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 ESTATE PLANNING CONVERSATION

“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.



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### REAL ESTATE

"Where do you like to vacation?"  
"Do you invest in real estate? How did you get into that?"



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### Q&A

**Gregory J. Sharkey, J.D.**  
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### ADDITIONAL QUESTIONS

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## WEBINAR RESOURCES

In a few days you will receive an email giving you instructions on how to access:

- The recording.
- The presentation slides.

[www.stelter.com/webinars](http://www.stelter.com/webinars)



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THANK YOU



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