



## Recommended Planned Giving Research and Resources

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### Research

- The Stelter Company, [www.stelter.com/research](http://www.stelter.com/research)
  - » "Metrics That Matter: The Links Between Advisors, Donors and Nonprofits" 2013
  - » "What Makes Them Give?" 2012
  - » "America Speaks" 2009
  - » "Discovering the Secret Giver" 2008
- Planned giving studies from Dr. Russell James
  - » "Words that Work: The Phrases that Encourage Planned Giving" [www.slideshare.net/rnja8c/talking-planned-giving-words-that-work](http://www.slideshare.net/rnja8c/talking-planned-giving-words-that-work)
  - » "Planned Giving and the Brain" [www.slideshare.net/rnja8c/planned-giving-and-the-brain?related=1](http://www.slideshare.net/rnja8c/planned-giving-and-the-brain?related=1)
  - » "Charitable Bequest Decision Making" [www.slideshare.net/generosity/charitable-bequest-decisionmaking?related=2](http://www.slideshare.net/generosity/charitable-bequest-decisionmaking?related=2)
- U.S. Trust Study of High Net Worth Philanthropy  
<http://newsroom.bankofamerica.com/press-kits/us-trust-study-high-net-worth-philanthropy>

### Resources

- Partnership for Philanthropic Planning, [www.pppnet.org](http://www.pppnet.org)
- Charitable Studies from Dr. Russell James, [www.encouragegenerosity.com](http://www.encouragegenerosity.com)
- Planned Giving Design Center, [www.pgdc.com/general/about-pgdc-network](http://www.pgdc.com/general/about-pgdc-network)

### Books

- *Planned Giving for Small Nonprofits*, Ronald Jordan & Katelyn Quynn  
[www.wiley.com/WileyCDA/WileyTitle/productCd-0471212091.html](http://www.wiley.com/WileyCDA/WileyTitle/productCd-0471212091.html)
- *Donor-Centered Planned Gift Marketing*, Michael Rosen  
[www.amazon.com/dp/0470581581/?tag=mlinn-20](http://www.amazon.com/dp/0470581581/?tag=mlinn-20)

### Blogs

- Michael Rosen Says, <https://michaelrosensays.wordpress.com>
- Future Fundraising Now, [www.futurefundraisingnow.com](http://www.futurefundraisingnow.com)
- The Agitator, [www.theagitator.net](http://www.theagitator.net)