

A generous donor wants to contribute a valuable non-cash asset to your nonprofit —What should you do?

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I get it. Non-cash gifts can feel intimidating and even a bit scary. Throughout my career as gift planner, I’ve facilitated hundreds of non-cash gifts and have taught hundreds of people to do it too.

This book will help to eliminate the fears you have when it comes to non-cash gifts. It will provide you with:

- Fundamental knowledge of each asset type.
- A step-by-step process you can use with virtually every non-cash gift.
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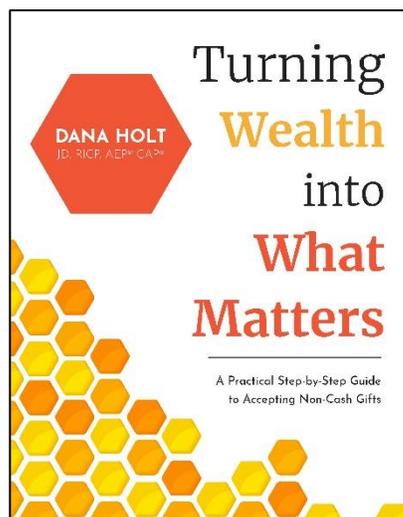
And it will help you:

- *Exceed your fundraising goals year after year!*
- *Take your career to the next level!*
- *Open up a world of new possibilities for donors, your organization, and YOU!*

What People are Saying:

“Turning Wealth Into What Matters makes non-cash gift fundraising accessible to nonprofits of every shape and size. It creates an efficient, easy-to-follow system for every type of gift. An essential resource that every fundraising professional should have.”

~Bryan Clontz, PhD., CFP®, CAP®, AEP®
President of Charitable Solutions, LLC
and author of Charitable Gifts of Non-Cash Assets



Turning Wealth into What Matters A Practical Step-by-Step Guide to Accepting Non-Cash Gifts

Dana J. Holt, JD RICP AEP® CAP®

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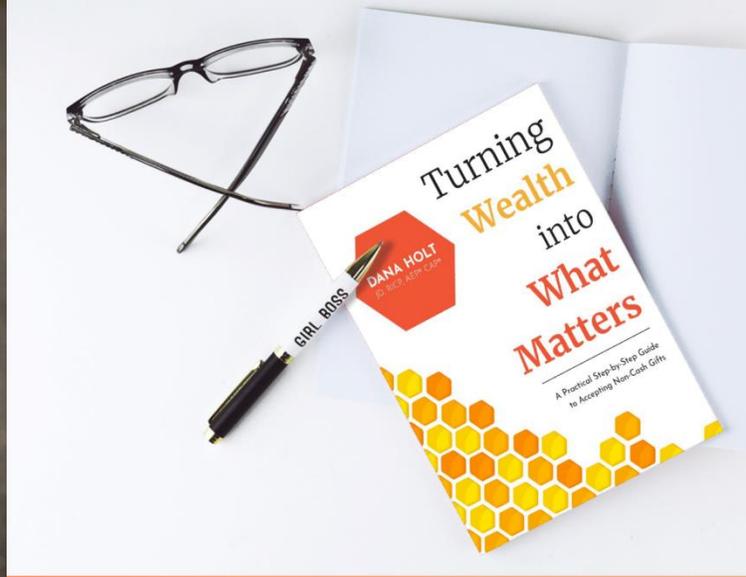


Dana J. Holt, JD RICP AEP® CAP®

To contact the author:
dana.holt@holtgiftplanning.com

Dana is a highly sought-after national speaker, writer, and consultant. She teaches fundraisers how to raise millions more by accessing wealth, not just cash. Before starting HOLT Consulting, Dana began her career as an estate-planning attorney and then spent 13 years at a Fortune 300 Financial Services company. There she helped advisors all over the U.S. with their most complex cases and taught them how to integrate charitable planning into their practice. Now she focuses exclusively on teaching charitable gift planning through professional speaking, consulting, and her first-of-its-kind online gift planning school, Turning Wealth Into What Matters™.

Dana is a graduate of Mitchell Hamline School of Law and Southern Illinois University. She has been quoted in Forbes and has been a featured writer for the Thomson Reuters Estate Planning Journal. She served as Chair of the Minnesota Gift Planning Association in 2020 and 2021. She is an avid gardener at her home in St. Paul, MN.



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What People are Saying:

The power of non-cash gifts is undeniable. They are powerful for the donor. They allow the donor to give smarter, simultaneously leveraging multiple levels of tax benefits. They are powerful for the nonprofit. Changing the donor’s mindset from giving out of disposable income to giving out of wealth can massively increase the magnitude of current and future gifts.

This is all true, but it doesn’t address the biggest challenge: How can you actually DO THIS? That’s the real problem. And now, this problem has a real solution! Dana Holt’s book Turning Wealth into What Matters provides that practical step-by-step guide for making non-cash fundraising a reality. It takes the fear out of non-cash fundraising and shows you exactly how to turn this idea into real-world results for your organization. If you want to take your fundraising to the next level, this is the place to start!

Russell James, J.D., Ph.D., CFP®
 Professor of Charitable Financial Planning
 Texas Tech University
 Lubbock, Texas

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<https://holtgiftplanning.com/>
dana.holt@holtgiftplanning.com

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EXCERPT FROM Turning Wealth into What Matters

How To Use This Book

This book is designed as a practical, step-by-step guide to help you establish or expand your non-cash gift capabilities. It focuses on the most common situations you will encounter when dealing with non-cash gifts. It does not cover every possible situation.

Chapter 1 will help you wrap your head around the world of non-cash gifts, donor motivations, working with advisors, and to set yourself up for success.

Chapters 2-9 address specific assets. Each chapter starts off with practical advice, including a 5-step process you can use to investigate, evaluate, accept, or decline a gift of a non-cash asset. At the end of each chapter, you'll find sample Procedures, Asset Questionnaires, Gift Instructions, and in some cases Deeds of Gift. These documents are meant as samples to help you get started. They should each be adapted to your organization's specific needs. I highly encourage you to consult with your legal and tax counsel to make sure that the documents you use are appropriate for your organization and in your state.

Do NOT skip right to the sample documents and overlook the practical advice section of the chapter. You will miss essential detail vital to the success or failure of a gift.

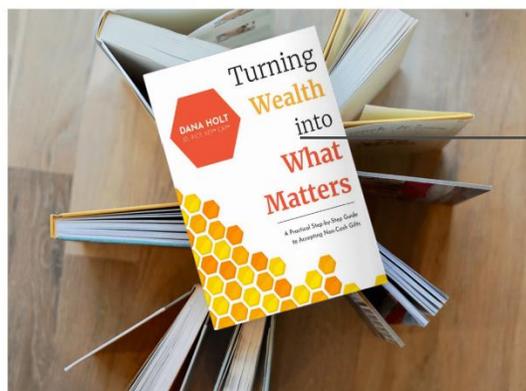
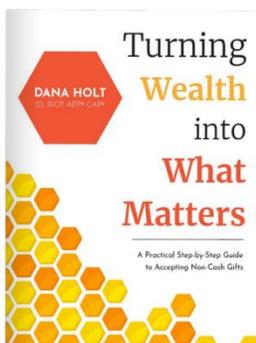
Chapter 10 takes a close look at Donor Advised Funds because they play a gigantic role in the world of non-cash gifts. It is very important you know how they work and how to use them to your advantage.

Chapter 11 summarizes some of the most important points of the book and gives advice for continuing your expertise when it comes to non-cash gift planning.

When performing detailed due diligence on a proposed non-cash gift, I encourage you to consult additional resources for a detailed explanation of legal and tax rules, including your legal counsel. I can recommend wonderful options. First, *Charitable Gifts of Noncash Assets* by Bryan Clontz. You can order a hard copy or download a free PDF online. Second, *GiftLaw Pro* from Crescendo Interactive. It is also free to view on their website. Neither HOLT Consulting, LLC, nor Dana Holt are affiliated with these companies and neither receives any compensation for these recommendations.

Charitable giving can result in significant tax, legal, and financial consequences. Neither HOLT Consulting, LLC, nor Dana J. Holt provides legal, accounting, or tax advice. You should consult your legal and tax advisors to determine how each individual gift situation will affect your donors and your organization.

To ensure compliance with IRS requirements, be aware that any U.S. federal tax advice that may be contained in this book is not intended or written to be used, and cannot be used, for the purpose of (i) avoiding penalties under the Internal Revenue Code or (ii) promoting, marketing and recommending to another party any transaction or matter addressed herein.





DANA J. HOLT
JD RICP AEP® CAP®
Author

holtgiftplanning.com
dana.holt@holtgiftplanning.com