

Who's involved in charitable giving?

The Right Side of the Table: Where do you sit in the minds of the affluent?

Book by Scott and Todd Fithian

Trust formula: $C + R + I / SO$

C: credibility

R: reliability

I: intimacy

SO: self-orientation

Three Adviser Styles

Sales: persuading a client to follow a specific course of action

Advice: providing an opinion about how to remedy a particular situation

Discernment: asking a sufficient number of the right questions for clients to achieve their own conclusions

Confidence formula: Trust + Clarity +
Competence + Management

Reasons Planning Fails

1. Lack of sufficient trust
2. Lack of sufficient clarity
3. Lack of competence (least likely reason, but it happens)
4. Lack of management

Team often includes (or should include) development officer, estate planning attorney, CPA, financial advisor, insurance professional