Crescendo Interactive

Practical Planned Giving Conference 2022

Articles and Reports for Follow-up

  - https://scholarworks.iupui.edu/bitstream/handle/1805/27562/UnderstandingHowDonors2022.pdf

- National Philanthropic Trust, “The 2021 Annual Report”
  - https://www.nptrust.org/annual-reports/the-2021-annual-report/ and
  - https://www.nptrust.org/philanthropic-resources/charitable-giving-statistics/

- Wealth Screening | Kindful: A Bloomerang Product
  - https://kindful.com/nonprofit-glossary/wealth-screening


Tools to Explore

- Altrata | Intelligence with Impact (https://altrata.com/)
  - Wealth Engine (https://www.wealthengine.com/) – Maxwell Pamphile
  - Wealth-X (https://www.wealthx.com/) – sign up for research updates by email!

- Crescendo Interactive | Integrated Marketing for Planned Gifts (https://www.crescendointeractive.com/)
- Giving Docs (https://www.givingdocs.com/)

- Instrumentl | The Smarter Way to Win Grants
  - 14-day free trial: http://instrumentl.com/r/appleton (link for PPGC 2022 attendees)
  - Guide to grants: https://www.instrumentl.com/freebies/grant-writing-resources-collection
  - Upcoming free virtual workshops: https://lu.ma/instrumentl/events
  - My contact is Karen Lee

Real Experiences from Carolyn’s Nonprofit Blog | Research Section (main menu)

- High Tech Research Worth the Investment (https://carolynmappleton.com/high-tech-research/)
- A Brief Account: “This is the Best D--- Thing” or Donor Screening Saves the Day (https://carolynmappleton.com/a-brief-account-this-is-the-best-thing/)
- Googling Your Guests (https://carolynmappleton.com/googling-your-guests/)
- YouTube (https://www.youtube.com/user/CarolynAppleton/)
## PRACTICAL PLANNED GIVING CONFERENCE

### SPEAKER EVALUATION

**Date:** __________________

**Speaker:** ________________________________________

**Name (optional):** __________________________________________________

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Vi. What did you like the most about the session?

____________________________________________________________________

VI. Any suggestions to improve future sessions?

____________________________________________________________________

XII. How many years of gift planning experience do you have? _______