

HOW PROFESSIONAL ADVISORS PARTICIPATE

Every day, your profession gives you the chance to help people secure their family's financial future. Today, you have the unique opportunity to help even further through LEAVE A LEGACY®.

LEAVE A LEGACY® is a national campaign to increase public awareness and interest in charitable estate planning. There is no cost to participate. The goal of LEAVE A LEGACY® is simply to increase the number and amount of charitable estate gifts that benefit charitable nonprofit organizations. Gifts can be large or small, whatever is appropriate for the client.

A major objective is to mobilize professional (donor) advisors on behalf of charitable nonprofit organizations. Education is the top priority. Education in charitable estate and gift planning for professional advisors is offered through the Colorado Planned Giving Roundtable (CPGR). Through its regular luncheon programs, brown bag seminars and the annual Summer Symposium, CPGR is a comprehensive resource to advisors on gift planning. CE credit is available for most sessions.

Professional advisors are in a unique position to encourage clients to make charitable estate gifts. Broad participation from Professional Advisors throughout Colorado will make LEAVE A LEGACY® a long-term success. By talking to your clients about charitable planning, you can help improve life in all of our communities for generations to come.

10 ACTIONS YOU CAN TAKE

1. **Provide charitable estate planning options** with every client you serve. Have a discussion, add a line that asks clients about their interest in charitable giving to any estate planning publication that you produce, or Mail LEAVE A LEGACY® brochures to your clients with a personally signed cover letter. Templates are included in your new member materials when you join.
2. **Join LEAVE A LEGACY® (at no cost)** and utilize the free tools available. Partnership Agreements are available [here](#). Familiarize yourself, your office partners and staff with the LEAVE A LEGACY® Colorado program.
3. **Run a series of articles about LEAVE A LEGACY®** in any newsletters or regular communication you have with clients. Include stories and testimonials from your clients about their giving.
4. **Use the LEAVE A LEGACY® logo** in all materials about gift planning.
5. **Become an ambassador for LEAVE A LEGACY®** by sharing information wherever you play or pray, and with family and friends.

6. **Serve LEAVE A LEGACY[®]** by joining one of the Sub-Committees and help raise community awareness!
7. **Support LEAVE A LEGACY[®]** financially, if appropriate.
8. **Join the Colorado Planned Giving Council** to learn more about gift planning and network with local advisors and non-profit professionals.
9. **Serve on a charitable board** or gift planning committee to assist charities in securing donations.
10. **Consider making your own legacy gift** to the charities of your choice.