APPENDIX A

RESOURCES

Books

Alzheimer's Advisor, The, Vaughn E. James, JD. American Management Association, New York. 2009. A Caregiver's guide to dealing with the tough legal and practical issues. Mr. James, a graduate of the SDA Theological Seminary and law school professor writes from personal experience with family members and clients covers the topic from recognizing the early signs of the disease to understanding the legal implications.

Baby Boomers Guide to Estate & Medicaid Planning, Jon A. Iverson, JD. Stonemark Publishing, Medford, Oregon. 2005. Elder law attorney explores 53 common estate planning issues with examples and explanation.

Building An Endowment, Lynda S. Moerschbaecher, Precept Press, Chicago, 136 pages. www.bonus-books.com, www.lyndam.com

Building a Planned Giving Program (3 volumes), Kathryn W Miree & Associates, Inc., www.giftplanners.com

Christian Guide to Wills, Living Trusts and Estate Planning. Mark L. James, JD and Lynne Marie Kohm, JD.Barron Publishing Company, State College, PA. 2007. www.barronpublishing.com. Breaks down estate planning into nine palatable steps and applies stewardship principals to each step. Glossary and index.

Complete Retirement Survival Guide, second edition. Peter J. Strauss and Nancy M. Lederman, Checkmark Books New York, NY. 2003. www.factsonfile.com Written for the 55 plus lay consumer by experienced elder law attorneys.

Counsels on Stewardship, Ellen G White, Chapters 62-64

Estate Planning Made Easy: Your Step-by-Step Guide to Protecting Your Family, Safeguarding Your Assets, and Minimizing Tax Bite, Phillips & Wolfkiel, Dearborn Press, 1998, 205 pages

Estate Planning Smarts: A Practical User-Friendly, Action Oriented Guide, Deborah L. Jacobs, DJWorking Unlimited, Inc. 2009, 329 pages. This book captures many complicated aspects of federal estate tax law and makes them readable for the lay person. It is a comprehensive and accurate guide to estate planning that tackles all the issues in clear easy to read style.

Executor's Handbook: A Step by Step Guide to Settling an Estate, Theodore Hughes and David Klein, Second Edition, Checkmark Books New York, NY. 2001. www.factsonfile.com. Practical and informative. Based on Michigan statute.

Faithful Steward: Reclaiming Stewardship for Christ's Kingdom, The, Michael O'Hurley-Pitts, Canadian Council of Christian Charities. 2002. 175 pages. A forthright and critical review of the assumptions and practices of secular philanthropy as these have been adopted by the Christian Church.

Federal Income Taxes of Decedents, Estates, and Trusts, 23rd edition, CCH Incorporated, Chicago, 239 pages.

Generations: Planning Your Legacy, Practical Answers From America's Foremost Estate Planning Attorneys, Robert A Esperti & Renno L Peterson with Charles C Case Jr & Stuart W Rapp

Guide to Elder Planning, Steve Wiseman, Prentice-Hall. 2004.

Harnessing the Power of the Charitable Remainder Trust, Eighth Edition, Marc D Hoffman, Leland E Hoffman Jr, PhilanthroTec, Inc. Matthews, NC, 2010, 249 pages

How To Use Financial Statements: A Guide To Understanding the Numbers. James Bandler. McGraw Hill, 1994. 147 pages. Covers a complex subject in plain English. Contains glossary and index.

How to Write an Investment Policy Statement, Jack Gardner, Market Place Books. PO Box 2466, Ellicott City, MD 21041. Addresses a critical fiduciary function in a concise manner.

Life and Death Planning for Retirement Benefits: The Essential Handbook for Estate Planners, Sixth Edition 2006, Natalie B. Choate, JD, Ataxplan Publications, Boston, 575 pages. Comprehensive, authoritative.

Looking Ahead: Estate and Long-Term Planning for You and Your Family, Kenneth M. Coughlin and Harry S. Margolis, Elder Law Answers. 866-267-0947. www. Elderlawanswers.com. Understandable, written for lay audience, updated annually.

Money, Possessions and Eternity. Randy Alcorn. Tyndale House. Wheaton, IL. 2003. Challengs typical understanding and money practices. Rich and stirring content.

Philanthropy & Taxation (two volumes), Conrad Teitell, 13 Arcadia Road, Old Greenwich CT 06870, 203.637.4553

Planned Giving Essentials: A Step-by-Step Guide to Success, Richard D Barrett & Molly E Ware, 1997, Aspen Publishers, Inc., 7201 McKinney Circle, Frederick, MD 21704, 800.638.8437

Planned Giving for the One Person Development Office, second edition, David Schmeling, Deferred Giving Services, 614 South Hale Street, Wheaton IL 60187, 630.632.4301

Planned Giving Management, Marketing and Law, Katelyn Quynn & Ron Jordan, John Wiley & Sons, Inc., 605 Third Avenue, New York NY, 800.879.4539

Planned Giving Simplified, Robert F Sharpe Sr, John Wiley & Sons, Inc., New York, 210 pages

Planning for Retirement Distributions: Tax, Financial, and Personal Aspects, Eric Donner with Victor M Finmann & Terry White, Harcourt Professional Publishing, 2000, 401 pages (with CD ROM containing sample forms & checklists & selected Letter Rulings)

Practical Guide to Planned Giving, Taft Group, 12300 Twinbrook Parkway, Suite 520, Rockville MD 20852, 800.877.8238

Professional Advisor's Guide to Planned Giving, Kathryn Miree, 2002, Panel Publishers, Frederick, MD, 800.638.8437

Provide & Protect, A. Charles Shultz. Crescendo Interactive, Inc., Camarillo, CA, 276 pages. This very readable book contains chapters with a brief quiz at the end of each chapter. The book covers the estate planning process assisting the reader in planning for family and charitable interests. The quizzes are designed to re-direct the reader to the web-based wills planner on www.giftplanning.com.

Start at Square One: Starting and Managing the Planned Gift Program, Lynda S Moerschbaecher, Precept Press, Chicago, 223 pages. www.lyndam.com

Stewards in the Kingdom, A theology of Life in All its Fullness, R. Scott Rodin, Inter-Varsity Press, Downers Grove, IL, 2000

Tales of Knock Your Socks Off Service: Inspiring Stories of Outstanding Customer Service, Kristin Anderson & Ron Zemke, Amacom Publishing, 1998, 193 pages

Tax Economics of Charitable Giving 2006-2007, Joseph P. Toce, Jr., JD, CPA et al., Wealth and Tax Advisory Services, Inc. of RIA. Extensive appendices and index.

Testimonies to the Church, Ellen G White, Volume 3 pp. 117-130, Volume 4 pp. 476-485

The Art of Planned Giving: Understanding Donors and the Culture of Giving, Douglas White, John Wiley & Sons, Inc., 362 pages, 605 Third Avenue, New York NY, 800.879.4539

The Complete Guide to Planned Giving, revised Third Edition, Debra Ashton, Ashton Associates, 24 Robertson Street, Quincy MA 02169, 617.472.9316, www.debraashton.com, 550 pages

The Harvard Manual on Tax Aspects of Charitable Giving, Osteen & Donaldson, Harvard University PG Office, 124 Mt Auburn Street, Cambridge MA 02138, 617.495.4647

The Makings of a Philanthropic Fundraiser: The Instructive Example of Milton Murray, Ronald Alan Knott, Jossey-Bass Publishers, 1992, 200 pages

The Millionaire Next Door, Thomas J Stanley & William D Stanko, Longstreet Press, Atlanta, 1996, 258 pages

The Planned Giving Idea Book, Robert F Sharpe, 6410 Poplar Avenue, Seventh Floor, Memphis TN 38119, 901.680.5300

The Portable Planned Giving Manual, Conrad Teitell, 13 Arcadia Road, Old Greenwich CT 06870, 203.637.4553

The Tax Law of Charitable Giving, Bruce Hopkins, John Wiley & Sons, Inc., 605 Third Avenue, New York, NY, 800.879.4539

The Thoughtful Christian's Guide to Investing, Gary D Moore, Zondervan Press, 1990, 335 pages

The Wall Street Journal Guide to Understanding Money & Markets, Wurman, Siegel, Morris, Access Press, 1990, 119 pages

Wall Street Words: An Essential A to Z Guide for Today's Investor, David L. Scott, Houghton Mifflin, New York, 433 pages

Internet Discussion Groups

Canadian Gift-pl Topics of interest to Canadian gift planners. To subscribe, sent the message "subscribe cdn-gift-pl Your Name" to" listproc@listserv.mcmaster.ca

Gift-pl Topics of interest to American gift planners. To subscribe, send the message "subscribe gift-pl Your Name" to: listserv@iupui.edu

Internet Resources

American Council on Gift Annuities: www.acga-web.com

Crescendo Interactive: www.crescendointeractive.com

Checkout Gift Law Pro by Crescendo Interactive. Access it on Crescendo Pro software or at http://www.giftlaw.com/glawpro.jsp?WebID=GL2005-0789
You can also get to this valuable resource via www.adra.org or www.IIW.org. Click through to planning giving page, then professional advisors link.

Gift College: Online continuing education at a modest cost produced by Crescendo Interactive. Follows Gift Law curriculum. www.crescendointeractive.com

Planned Giving Design Center: www.pdgc.com.
Helps charitable organizations create strategic alliances with legal, tax, and financial services professionals in their communities who have the capacity to influence philanthropy.

PG Calc: www.pgcalc.com

Periodicals

Charitable Gift Planning News, Jerry J McCoy, JD, et al. Editor, JAS Destiny, Inc. Publisher, PO Box 551606, Dallas TX 75355-1606

Planned Gifts Counselor, Practical Publishing, LLC publisher, PO Box 970367, Orem UT 84097, 877.742.0499

Planned Giving Today, G Roger Schoenhals editor. Mary Ann Liebert, Inc. Publisher. New Rochelle, NY. **800-654-3237.** http://pgt.liebertpub.com/

Taxwise Giving, Conrad Teitell, Editor, 13 Arcadia Road, Old Greenwich CT 06870, 203.637.4553

The American Philanthropy Review, Steven Nill, 30021 Tomas Street, Suite 300, Rancho Santa Margarita, CA 92688, 714.589.5938

The Chronicle of Philanthropy, The Chronicle of Higher Education, Inc., 1255 23rd Street, North West Washington DC, 800.728.2819

The Tidd Letter, Jonathon Tidd, 9 Beaver Brook Road, West Simsbury CT 06092, 203.651.8937

Professional Associations

American Council on Gift Annuities, 310 N Alabama, Suite 210, Indianapolis IN 46204-2103, 317.269.6274, www.acga-web.org

Association for Healthcare Philanthropy, 313 Park Avenue, Suite 400, Falls Church VA 22046, 703.532.6243

C.A.S.E. (Council for the Advancement and Support of Education), 11 Dupont Circle NW, Suite 400, Washington DC 20036-1261, 202.328.5900, www.case.org

National Society of Fund Raising Executives, 1101 King Street, Suite 700, Alexandria VA 22314-2967, 703.684.0410