

## *Reading List:* Planning/Strategy in Giving & Financial Education

### ***Inspired Philanthropy***

Tracy Gary

Practical guidance and tips for aligning and integrating values and passions, and developing giving plans that support and inspire communities and families. *Inspired Philanthropy* explains how to make a difference by creating giving and legacy plans, and offers ideas on how to partner with advisors and nonprofit leaders for the greatest outcomes. In this new addition, the authors include overall updates to statistics, a discussion of the implications of the Buffett gift to the Gates Foundation, new legacy planning tools, expanded resources on youth, giving circles, and communities of color, key questions for advisors and donors, and worksheets and resources available on an enclosed CD.

### ***Raising Financially Fit Kids***

By Joline Godfrey

Joline Godfrey, one of the country's leading experts on kids, parents, and money, gives parents the secrets and knowledge she has gleaned from a decade of working with kids on financial literacy and business. Designed for adults - parents, grandparents, mentors, advisors, and educators - concerned about raising children ages 5 to 25, *Raising Financially Fit Kids* is centered around a developmental map covering ten specific money skills each child can master by the age of 18 to become a financially secure adult. This map gives parents a step-by-step approach to helping their kids become habitual savers, smart money managers, and responsible decision makers.

### ***Generations of Giving: Leadership and Continuity in Family Foundations***

By Kelin E. Gersick

*Generations of Giving* tackles the nature and dynamics of family foundations, exploring how families effectively structure their giving programs, and pull off the often monumental task of succeeding for at least two generations. This book is based upon a study of foundations in the United States and Canada that have survived through at least two generations. A pioneering examination of multigenerational family foundations, Kelin Gersick's "authoritative study on family foundations" quickly became "a must-read for anyone who has a family foundation or is considering one."

### ***Family Wealth: How Family Members and Their Advisors Preserve Human, Intellectual and Financial Assets for Generations***

by Jay Hughes

Hughes challenges conventional notions of wealth and offers guidelines for preserving family assets in the broadest senses, focusing on the importance of nourishing human and intellectual capital in order to grow the financial capital. This book is text heavy, and at times repetitive, but the concepts are important and applicable for any family looking to honor their legacy and their members.