

CPS Reflections from 2006

William K. Busch:

I joined the CPS program in April 2006 and have since attended four CPS educational sessions and the March of Dimes National Convention in Kansas City. These education sessions that Kelly, Randy, and Jerry have conducted have been complete, practical, and focused. The training and education has most importantly given me the confidence to initiate conversations with existing clients and prospects about the dynamics of using charitable giving strategies to solve a variety of personal, business, and estate planning issues and concerns. I am just beginning to realize, based on real case activity, the marketplace advantage of having at my disposal, the training, tools, and expertise support that Philanthropy International provides.

I have conducted three events jointly sponsored by Philanthropy International and the March of Dimes. These events have generated a number of initial exploratory conversations with attendees. Thus far, these conversations have led to two cases where initial discussions towards implementing strategies are in progress. A third case has progressed where a CRT is being finalized which will involve a significant gift to charity. I look forward to a very satisfying and successful 2007.



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Timothy P. Murray:

Our fall consumer seminars with the March of Dimes went great. The local March of Dimes staff was great to work with. As far as running the seminar, it was a piece of cake. We just followed the instructions and scripts developed by PI. The clients loved the seminar and we got very high grades.

Our goal was to get 15 cases to work on and we will exceed that. Our first case is being completed and provides a nice gift to the March of Dimes. This system is wonderful if you are looking to really help your clients, help society (MOD) save babies and be rewarded handsomely for your family. It is hard work but is the most fulfilling thing I have ever done in my career.

God sends people into our lives for a reason and I think he sent Kelly and Philanthropy International to help us truly understand how great our business can be for our clients, our communities and ourselves. I am so proud to be involved with PI as it helps me reach my true potential as a servant leader. Thanks for letting me in.

Timothy P. Murray, CLU, ChFC
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Jordan D. Chadwick:

I am very pleased that my client has agreed to make a 5% irrevocable donation to the March of Dimes Birth Defects Foundation. Quite honestly, this would never have been done had it not been for the knowledge I have developed as a CPS and my relationship with Philanthropy International. Right now my clients CRUT is valued at \$2.4 million. He and his wife own nearly \$40 million in income property that will all flow through this trust. One can only imagine what that 5% remainder total will mean to the March of Dimes someday.

I can attest to the fact that the "learning curve" to become and practice as a CPS is an ongoing ever changing and challenging effort, however I must say that this opportunity would have never presented itself to me had I not had this knowledge and relationship. Working with my client and utilizing just a few of the strategies and techniques I have learned from Philanthropy International, has opened this door as well as many other projects I am currently working on.

I can honestly say that since I started this part of my business marketing, I have found out about a lot of great and needy charities--but charitable people are everywhere! I have conducted 4 events and have 2 more planned for early 2007.



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