

TRACY GARY

PHILANTHROPIST, SPEAKER

Tracy Gary offers practical wisdom, clarity and greater peace of mind to people who seek to thoughtfully manage their inherited or earned wealth. She also trains nonprofit development staffs and board members to build authentic donor partnerships for annual, multi-year, capital, and legacy gifts.

Fees are available for:

- One day: \$6,000 for 1 to 4 venues/ presentations including coaching with leaders
- Two days: \$9,000 for up to 8 varied venues
- Zoom event: \$2,000
- CEU credit preparation possible

(includes planning meeting, event co-design, marketing materials, zoom events, and debrief following event)

You may share costs and programs with other sponsors or co-hosting organizations.

BOOKING TRACY
Michelle Massman
320.333.0282
mjmassman@aol.com

A champion of donor activism and women's leadership for fifty years, Tracy is known internationally for her work in the field of community-based giving with diverse communities. A speaker, coach and workshop leader, she has worked in all 50 states and 23 countries. Her unique strategy is threefold: she advises donors in aligning their giving with their deepest values, works with leaders in non-profits on their fundraising practices, and builds networks across communities. Her effectiveness in galvanizing change that addresses local and global needs, arises from her core organizing principle: that we create a better world by inviting all to decision making tables. She sparks donors to engage fully in partnerships with active changemakers, to leverage the donor's impact, and to unleash their generosity.

She is co-founder of 24 nonprofits, including Unleashing Generosity, Inspired Legacies, Changemakers, The Women Donors Network, Women Moving Millions, EDGE Global Funders Network, and many more. Her book: "Inspired Philanthropy: Creating a Giving Plan and Leaving a Legacy" has sold 44,000 copies and is a classic tool for donor leadership.

Sample Agenda Day 1

- Reception upon arrival with nonprofit leaders
- Board dinner or major gift or prospect dinner
- Financial and legacy advisors breakfast
- Morning workshop for donors or staff morning session
- Lunch keynote with panel Tracy helps facilitate
- Afternoon workshop
- Board or staff summary and debrief on what's next.

Sample Agenda Day 2:

- Breakfast meeting or morning workshop
- Lunch with donors or Donor Advised Fund holders
- Afternoon training with staff or workshop for donor families
- Debrief and next steps

*two nights of hotel

Sample presentations for donors and their advisors:

- Getting Our Family on the Same Song sheet: 10 Essentials for Wealthy Families **(New)**
- Donor Advised Funds, Pros and Cons **(New)**
- Choosing and Managing Financial and Estate Planning Advisors
- How Advisors and Institutions Can Better Serve Wealthy Clients and Families
- Donor Intent: Inspiring Generosity and Self Sufficiency During Your Life and After You're Gone **(New)**
- Let's Get Together Before Crisis Hits: What I/we Want You to Know about the Transfer of my/our Wealth
- Philanthropic and Legacy Vehicles: Choices and Values of Private Foundations, Supporting Foundations, Donor Advised Funds, Financial Service Funds, Banks/Trust Companies, Individual Advisors, Philanthropic & Estate Planning Advisors
- Talking with the Next Generation about Family Values, Leadership and Community

Sample presentations for Nonprofits:

- Becoming an Outstanding Board Member: Keys to Success and Lessons Learned
- Raising Money and Leveraging Influence: How to Maximize your Capacities & Impact
- Getting Over the Fear of Asking for Major Gifts: Becoming a Donor Activist & Donor Partner



PHILANTHROPY. LEGACY.

PHILANTHROPIST. AUTHOR. SPEAKER. CONSULTANT.