

# MAXIMIZING YOUR FINANCIAL, PHILANTHROPIC AND LEGACY LEADERSHIP

We offer you the following pre-event interview and attach again the invite to participate in, "Maximizing Your Financial, Philanthropic and Legacy Leadership." Meet Susan Stein and Tracy Gary for this program series scheduled from Wed. March 8 through Friday, March 10, with a menu of various 1-3 hours programs for you to choose from.

*Kindly RSVP by Feb. 25<sup>th</sup> or ASAP to (414) 278-0000.*

The programs are \$150-\$175 each for individuals and \$275 for a special workshop for couples on March 8<sup>th</sup> from 4-8 pm. Please join us for the programs that match your interests.

*Note: We will donate to a nonprofit of participants' choice any fees gathered that exceed Inspired Legacies fee or Susan's costs for the events.*

Tracy Gary and Susan Stein interviewed by Jean Russell from [Spinorb](#), Feb. 9, 2006.

## 1. What has motivated you both to become philanthropic advisors?

Susan (SS): I am motivated by a love for others and for our community. I appreciate how, today, more than ever, philanthropists want to choose wisely. And I want to tackle Milwaukee's diverse human, medical, and educational needs more effectively. From a lifetime of serving in nonprofits, I feel passionately committed to making our society more just and caring for people in need. I have thirty years of executive management experience working to keep businesses and nonprofits focused and timely. I became a philanthropic advisor because, through my experience, I developed the knowledge necessary to help people take a long in-depth view of their philanthropy and create lasting legacies of support and change.

Tracy (TG): As a philanthropist myself, I wanted to know how to give well and have an impact. As I shared what I learned, I discovered that one of my gifts was helping others to be better, more inspired philanthropists. I dream that all donors will love their work with nonprofits as much as I do. I know that we can become better at creating philanthropic legacy plans. After 25 years as a philanthropic and legacy advisor, I have the courage capital, creative capital, and wisdom capital from working with 6000 nonprofits and donors nationally and globally. Now the possibilities of what we can do together energize me more than ever!

## 2. Why you have designed this mix of programs as you have?

TG: Donors and their families are very, very busy. Based on working with many donors and families all over the country I know that a menu of various offerings affords more tailored and efficient choices making good use of participants' time.

SS: In the donor community, major donors are also key institutional board members. I understand they are increasingly concerned about the lack of oversight even in here-to-fore well-run organizations. Strategies for Philanthropy help donors and board members become stronger in their leadership and in their family discussions about giving, possibly at new levels. We feel that these programs meet a critical need for knowledge and conversation.

### 3. What do you hope donors and families will get out of the program?

SS: Donors and families seek clarity about how to direct their giving and also, to widen their charitable horizons. We hope to provide a way to get that clarity. There are so many choices in the southeastern Wisconsin nonprofit community and nationally – and it's not easy to choose.

TG: A key benefit of donors convening is the exchange with other major donors and philanthropists to share their own experiences, challenges, failures, and successes, in a confidential environment.

SS: Having presented and convened conferences on women and philanthropy, I wanted to respond to the interest expressed by women in sharing these conversations with their spouses and other generations of their families. Simply put, our desired outcome is that our participants imagine greater joy, consciousness, and impact in their giving.

### 4. What do you want donors to know additionally?

TG: Susan and I went to college together and are passionate about partnering with donors, and their families and the nonprofit community. Susan is generously volunteering her time to extend this opportunity to Inspired Legacies and to me, and I am excited to learn more about the needs and dreams of Wisconsin donors.

SS: Those who have signed up, include people from a wide geographical range, who will shed different perspectives on the issues facing families and nonprofits today. We care deeply that the transfer of wealth and leadership in families and in the NP sector happen with clear intention.

### 5. Any final comments together?

TG/SS: We see the need for donors growing in their families, in broad-based communities, and also in circle periodically with each other. Other cities have established donor education programs just for donors. We hope you will be part of growing the culture of support here for this valued sector of our democracy: you the donor and benefactors of such good.

Please join us. RSVP by Feb. 25<sup>th</sup> to (414) 278-0000.

