



AN UNPLANNED PATH TO PLANNED GIVING

“Here in the United States, every 30 seconds, a lawyer leaves the practice of law to begin a career as a gift planning officer.” So begins “A Career in Gift Planning,” by K. Ballard, in *The Journal of Gift Planning*, vol. 5, no. 2 (2001), an article that helped me move into the planned giving profession. Although the quote above was hyperbole, planned giving is a good career option for many lawyers.

WHERE I AM

Planned giving is the art of helping people support a charity in ways that best complement their overall financial plans and the vision they have for the organization they want to help. Often planned gifts are deferred, such as bequests or charitable remainder trusts. Planned gifts frequently are made using property instead of cash. Planned gifts often provide security to a donor through an annuity issued by a charitable organization in exchange for the donor’s gift. I receive immense satisfaction from feeling that I help enrich the lives of donors while furthering education at Willamette.

WHERE I CAME FROM

I practiced income tax law for many years with one of the largest firms in Portland. The firm and its people were wonderful, and my practice was rewarding to me in many ways. However, I finally realized that I never would be able to deal adequately with the stresses – often self-inflicted – of practicing law. In the summer of 2000, I left the firm with no clue about what I would do next.

HOW I GOT HERE

The OAAP Lawyers in Transition program helped me find a direction and provided a steady compass for my journey. If nothing else, meeting so many other lawyers who are exploring options outside the practice of law, each for a different reason,

is comforting to someone who has deserted an apparently lofty perch in life. But the OAAP offers much more than that through workshops and individual career counseling.

In the fall of 2000, I started talking to everyone I knew about what I could do with my life. I had never heard of “planned giving” until a friend in fundraising told me I was perfect for that line of work. With that kind of encouragement, I figured I should check it out. After meeting numerous planned giving professionals (who invariably provided names of others in the field), joining the local professional organization, and reading everything I could – both technical and anecdotal – about planned giving, I decided my friend was correct about planned giving being right for me. Now I needed to find a job.

My successful job search was a result of three things: perseverance, perseverance, and perseverance. The article cited in the first paragraph – a gift from a thoughtful planned giving officer who met me for coffee one day – did wonders to help me formulate a plan for convincing myself and prospective employers that I would be an ideal planned giving officer despite my lack of experience. More important, however, was networking in ways I had never imagined, and following every lead regardless of how tenuous it appeared. Although my legal experience and other life experiences were instrumental in finding my position at Willamette, I might not be here if a lawyer friend had not said one day, “You should talk to my friend at Willamette about planned giving.”

WHY IT HELPS TO BE A LAWYER

Some quantitative skills and an interest in basic tax law are required for success in planned giving. But almost any successful lawyer has the ability to master the technical details. Lawyers have many other skills that are invaluable in planned giving, such as the ability to:

- Listen to people and sort out what is important;
- Understand financial matters;
- Explain to clients (donors) what their options are;
- Write clearly and concisely;
- Manage multiple projects simultaneously; and
- Engender confidence in the eyes of donors and their professional advisors.

These skills, coupled with a commitment to the organization and a sincere interest in helping donors accomplish their goals, make planned giving a satisfying alternative career option.

Stephen S. Brier
Director of Planned Giving
Willamette University