

Navigating Ethical Dilemmas in Gift Planning

Professional Association Guidelines:

- Charitable Gift Planners
 - [Model Standard of Practice for the Charitable Gift Planner](#)
 - <https://charitablegiftplanners.org/standards/model-standards-practice-charitable-gift-planner>
- Association of Fundraising Professionals
 - [Code of Ethical Standards | Association of Fundraising Professionals](#)
 - <https://afpglobal.org/ethicsmain/code-ethical-standards>

Additional Resources:

- “Ethical Issues in Gift Planning” by Frank Minton
 - Courtesy of Frank Minton, an excerpt is attached
- “REAL PROPERTY, TRUST, AND ESTATE LAW: Ethics for Estate Planning Attorneys on Charitable Boards” by Richard C. Mills
 - Available at American Bar Association *Probate & Property*, Nov/Dec 2015 (29:6)
 - Excerpt at:
https://www.americanbar.org/groups/gpsolo/publications/gp_solo/2018/march-april/real-property-trust-estate-ethics-estate-planning-attorneys-charitable-boards/
- Avoiding the Dark Side: The Ethics of Gift Planning
 - Sharpe Group, posted February 2016 available [here](#)
 - <https://sharpenet.com/give-take/avoiding-the-dark-side-the-ethics-of-gift-planning>
- “Doing the Ethical Thing” by G. Roger Schoenhals
 - Available for purchase from [Planned Giving Today, Volume 19 Issue 8, August 2008](#)
 - <https://www.liebertpub.com/doi/abs/10.1089/pgt.2008.19.8-1?journalCode=pgt>
- “Trust the Virtues, Not Your Belly” by Rebecca Rothery
 - Available for purchase from [Planned Giving Today, Volume 18 Issue 4, April 2007](#)
 - <https://www.liebertpub.com/doi/abs/10.1089/pgt.2007.18.4-1?journalCode=pgt>
- Ethical Issues and the Planned Giving Donor
 - The NonProfit Times, posted May 2006, available [here](#)
 - https://thenonproffitimes.com/npt_articles/ethical-issues-and-the-planned-giving-donor/