

Tracy Gary

Author, *Inspired Philanthropy*
Executive Director, Inspired Legacies



Philanthropic and Legacy Advisor

Available for public speaking and private consultations, Ms. Gary works as a philanthropic and legacy advisor for a wide array of groups including American Express Financial Services; New York Life; the Institute of Noetic Sciences; regional grant making associations; private, family, and community foundations, donor networks, and grassroots community groups. Traveling all 50 states and numerous international locations, Tracy promotes service and impactful giving broadly.

Media Appearances

- * The Today Show
- * Oprah Winfrey
- * Time Magazine
- * The New York Times
- * The Los Angeles Times
- * The Washington Post
- * The Dallas Times
- * The Chicago Tribune
- * The San Francisco Chronicle
- * Lear's
- * Ms. Magazine
- * Success Magazine
- * Town & Country Magazine
- * International Herald Tribune
- * Chronicle of Philanthropy
- * Women's Enews
- * Financial Planning
- * PBS-Wealth Track

Unleashing Generosity

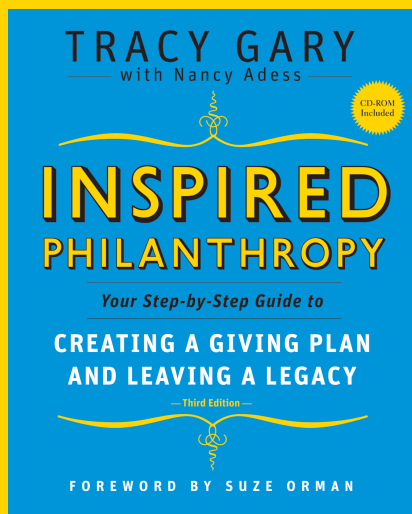
A donor activist and philanthropist for more than 25 years, Tracy Gary educates and supports donors, family foundations, financial service organizations and nonprofits about the stewardship of money, leadership, and philanthropy. At the heart of it, Ms. Gary discovers what is important to those she educates and supports. Then Tracy assists in resourcing and connecting dreamers and dreammakers and the advisors that can help to manifest their capacities.

Through her eighteenth start-up, a nonprofit called Inspired Legacies, she consults with a diverse range of individuals and organizations to improve and expand philanthropy and volunteerism.

Ms. Gary has been active in the nonprofit community since she was thirteen, offering her life as a volunteer, board member, founder, and philanthropist. She lives in Houston, Texas and Ross, California.

Inspired Philanthropy: Your Step by Step Guide to Creating a Giving Plan and Leaving a Legacy

by Tracy Gary with Nancy Adess
published by Jossey-Bass
November 2007
www.inspiredphilanthropy.org



"Tracy is not only an inspirational figure, but delivers solid training points that financial people can use immediately."

~ Philip Cubeta
CLU, ChFC, MSFS, CAP,
Chief of Staff of The Nautilus Group

Clients

This list reflects some of the over 1000 groups that Tracy Gary has worked with between 1973-present as a philanthropic and legacy advisor.

National Network of Grantmakers
International Development Exchange
Social Venture Partner International
National Planned Giving Council
Grantmakers Association of Fundraising Professionals • National Association of Philanthropic Planners • The Pittsburgh Foundation • PNC Bank LEAVE A LEGACY • Boston Foundation
Marin Community Foundation • The Funding Exchange • YWCA (multiple)
Harvard University • Kennedy School
Falcon Fund • Women Donors Network
Threshold Foundation • Girls Scouts of America • Bank of America • Bioneers
Kennedy School • Resourceful Women
Global Fund for Women • Foraker Group, Alaska • New England Giving Council on Foundations • Philanthropy Northwest • Green Money Magazine
Nautilus & New York Life • Institute of Noetic Sciences • Trillium Capital Management • Women's Philanthropy Institute.

Plus: Tracy has between 1973-present worked with over 6000 wealth holders and their families in over 3000 workshops, conferences or family meetings.

Tracy Gary's Most Requested Programs

Wealth Holders:

- Living and Leaving your Legacy
- Inspired Philanthropy: Creating a Strategic Giving and Legacy Plan.
- Unleashing the Generosity Generation (New)
- Working with Advisors for Inspired Outcomes (New)
- From Quilting Bees to Giving Circles: Women Transforming Families, Communities, and the World
- Best Practices: Community Foundations: Engaging our Highest Leadership & Resourcefulness (New)
- New Trends in Transformative Giving (New)
- Creating Strong Funding and Donor Education Partnerships (New)
- Strategic Philanthropic, Financial and Estate Planning: Integrate Your Values, Vision and Your Team
- Giving and Investing Locally, Nationally, and Globally: Creating a Balanced Giving, Living and Bequeathing Portfolio
- Women as Family Money Mentors
- Choosing and Managing Financial and Estate Planning Advisors
- How Advisors and Institutions Can Better Serve Wealthy Clients and Families (New)
- Intergenerational Giving: Sparking the Giving Impulse (New)
- Youth Giving: New Trends in Creating Change (New)
- Community-Based Giving: Donors, Community Leaders and Activists in Partnership
- Reinvesting our Resourcefulness & Wealth to Change the Poverty Paradigm (New)
- Inspired Leadership: Best Practices of Fundraising, and Philanthropic Mentorship

Nonprofits:

- Donor engagement and philanthropic legacy planning for high net worth donors to your organization.
- Fearless Fundraising for Boards, staff, and key volunteers or grantees
- Prioritizing Fundraising: Tools and tips for engaging major and lifetime donors
- Nonprofit board and staff development
- Nonprofit leadership
- Authentic Donor Engagement: Building for our Communities & Democracy (New)
- Are You Ready for the Current Transfer of Wealth?
- Investing in Capacity: How to Attract Larger Donor and Funder Investors
- Donor Partnership through Financial, Philanthropic and Legacy Education
- Development Planning: Optimize your Time and Dollars
- Working with Advisors for Inspired Outcomes (New)
- Democratizing Philanthropy: How Giving Together Can Heal our World (New)
- Do your values match your portfolio holdings
- Living and Leaving your Legacy

Families, Nonprofits, Wealth Networks, or Business Roundtables (same as left, plus):

- Family Leadership: What Every Family Catalyst Needs to Know to Move their Families on Key Money Issues
- Venture & Adventure Philanthropy: New Trends in Excellence (New)
- Family Retreats: Choosing Advisors and Finding Resources
- Getting Our Family on the Same Songsheet: 10 Essentials for Wealthy Families (New)
- Family Unity: Creating a Values-Based Family Mission Statement and a Cooperative Philanthropic and Legacy Statement
- Donor Intent: Inspiring Generosity and Self Sufficiency During and After Your Life (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 Value + and - of Private Foundations, Supporting Foundations, Donor Advised Funds, Financial Service Funds, Banks/Trust Companies, Individual Advisors, Philanthropic and Estate Planning Advisors (New)
- Becoming an Outstanding Board Member: Keys to Success and Lessons Learned
- Raising Money and Leveraging Influence: How to Maximize your Capacities & Impact
- Talking with the Next Generation about Family Values, Leadership and Community
- Getting Over the Fear of Asking for Major Gifts: Becoming a Donor Partner
- Engaging the Right Team for the Best Outcomes: Advisors, Donors & Nonprofits (New)

Donor education program - highest level donors:

Includes information on strategic philanthropic planning, creating a giving plan, and a family philanthropic mission statement.

- Becoming an outstanding Board member:
- Inspiring Donors to Become Donor Partners
- Inspired Leadership: How to Leverage Your Leadership in Giving and Through Legacy
- Working with Advisors for Inspired Outcomes (New)

Do you need more support?

Or other topics?

Or have questions?

Call us @ 415-461-5539.

For more information, see www.inspiredlegacies.org OR www.inspiredphilanthropy.org

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