

Inspiring Leadership

Donors, Advisors and Nonprofits Unleashing Generosity



inspired
LEGACIES

Unleashing Generosity

Bi-Annual Report

2006 - 2007





Mission

Inspired Legacies facilitates partnerships between donors, advisors and nonprofits to grow giving and transform society.

Values

Integrity

Inspired Legacies honorably serves donors, advisors and nonprofits. We are committed to respecting client confidences and to upholding the highest standards of professionalism.

Inspiration

Inspired Legacies exists to inspire our constituents and partners in making the world better through legacy planning, personal leadership and philanthropic activities.

Generosity

Inspired Legacies encourages through its policies, actions and online programs generosity of spirit, energy, time and treasure.

For more information about our leaders, plans and programs as well as photo key visit:
www.inspiredlegacies.org/report08.htm

We invite you to join or rejoin us as transformational donors to Inspired Legacies.



Unleashing Generosity

1722 Haver Street
Houston, Texas 77006

Tel. 713.527.7671
Fax 713.527.7672

info@inspiredlegacies.org
www.inspiredlegacies.org

Inspiring Leadership

Donors, Advisors and Nonprofits Unleashing Generosity to Transform Communities



2006 - 2007
Bi-Annual Report

We grow great donors and their leadership.

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Tracy Gary
Founder and Executive Director

“How can we transform that which we’ve been given?”
“Can we guide or shape the cultural shift we are currently in?”

Dear Collaborators,

With these two questions generated by Orland Bishop and myself during a leadership summit called the Tipping Point Network, I recognized that Inspired Legacies was on path as a force for breakthrough work. All the organizations, advocacy and research efforts needed to mid-wife this new culture require breakthrough leadership and strong partnerships. We serve this purpose.

Inspired Legacies is my 18th and most recent nonprofit start-up during my 35 years as a donor, educator and nonprofit entrepreneur. We are blessed to have been given the 501(c)(3) status for Resourceful Women. I began Resourceful Women to serve women with wealth in the 1980s and ‘90s. We renamed the nonprofit in its new form in early 2006 and moved its headquarters to Houston. We expanded the mission and vision to work with advisors, donors and nonprofit leaders, then added a team of strategic donor partners and leaders.

When Phil Cubeta, a financial professional whom I knew and respected, offered new insights in working with advisors, we found common ground for our launch. Donors were missing engagement opportunities and were not leading or giving to their full potential because they often lacked the team they needed with their legacy decision-makers. We offer in this report our first two years of impact, with gratitude to our investors, donors, staff, volunteers and consultants who have moved us to lead and forge new paths.

My deepest gratitude,

Tracy Gary

Founder & Executive Director

“There is nothing more difficult to take in hand, more perilous to conduct, or more uncertain in its success, than to take the lead in the introduction of a new order of things.”

Niccolo Machiavelli

Dear Friends,

Shaping the world we want takes audacity and persistence. We owe to Tracy, Lorrie Lampson, Jean Russell, Phil Cubeta and a new IL board -- the team who launched IL in 2006 -- our soulful appreciation. Bob Belkin, a Houston-based marketing consultant who formerly advised on planned giving and finance, served for the first two years from the Spring of 2006 to the Spring of 2008 as our Board Chair. Hats off to so much good work done by our founding board and team! Tracy, as she had done so often in the past, approached 25 seed donors who knew what “a leap of faith” meant and asked them to give



money and leadership to another forward thinking idea: building strategic legacies.

I am part of the second team of leaders, and have helped double the organization’s donors, consultants, advisors, clients and partners who now make change happen nationally through Inspired Legacies. We offer this report as a showcase of collective wisdom and experimentation and as beacon of light during breakthrough times.

Appreciatively,

Joanne Reich

Board Chair



Joanne Reich
Board Chair

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An Invitation to Transformational Leaders

Transformational leaders are filled with the ultimate belief that we can indeed change the world. They accept responsibility for the future and for co-creating it with others who feel this passion to move ever forward in this great evolution, outside and within.

They've experienced that moment of insight, that flash of certitude in their souls that every moment is a fresh dimension of the one just past in an immutable flow forward. All relationships, in this new evolutionary context, have new meaning. The beaten path no longer holds allure.



Transformational leaders listen deeply and can discern both the strongest messages and the least heard, for both are important. They become incubators of innovation, seeking fresh approaches and ever more appropriate ways to convey

inspired ideas. They challenge their own inner resistance to change, transcending old dogma and negative messages of the past. In doing so, they create

room for new generations of insights and deeper, more holistic understanding, finding courage to challenge the status quos in the world.

Co-creating is not an easy dance. This evolutionary process is fueled by the electricity of exacting minds colliding and converging from varied perspectives to bring forth a metamorphosis of the future. Co-creating takes the best, even the unrealized, from every architect involved to find purposeful paths to common dreams and new realities.

Building a new world and a new culture is a thrilling dance, the most challenging life work, the most ambitious reach that humans can make with their outstretched souls to touch that place in the next, better dimension. Its needs are ever expanding, ever evolving. It calls out for more architects, more minds that are ready to be transformed so they might do the demanding dance of transformation.

Each of us can feel a mysterious evolutionary impulse compelling us to dare to play a role in creating our future.

Our response to it opens unimaginable possibilities.

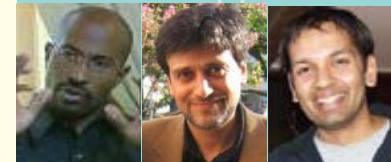
Feel your part in this evolution.

Bring your gifts, your heart to this table of discovery.

Become the breakthrough to a better world.

Be the immutable flow forward.

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Intergenerational Transfer of Leadership

We are in the greatest intergenerational shift in leadership that has ever occurred in our nonprofit, philanthropic sector. According to a report by Thomas Tierney of the Bridgespan Group, “the nonprofit sector will need at least 80,000 senior managers by 2016, nearly 2.4 times the number currently employed.”

And we have teen and 20- to 40-year-olds eager to make their mark and modernize the ways and means of giving. The talent we need is before us. Without solid and consistent donor leadership and financial commitments, our most careful transitions will fail.

Inspired Legacies is here to assure that we have an expanding generation of bold and brilliant, inspiring donor leaders. For more than 35 years, our founding leadership has been modeling and nurturing creative, bold and strategic leaders. We are training new donor organizers and professionals with whom to work and link.

Intergenerational Transfer of Wealth

As Paul Schervish of Boston College’s Center on Wealth and Philanthropy reported in 2003, the estimates of the coming intergenerational transfer of wealth over the 54-year period from 1998 to 2052 range from a conservative \$41 trillion to trillions more.

We are already in the nexus of these two shifts. Inspired Legacies is at the center of cross-pollinating best practices. We help guide the flow of funding and leadership and assure that wise stewards of these shifts make change and connections happen through lifetime and legacy giving and intergenerational partnerships. We must shape our clay together and try out our collective wisdom, gently transitioning with love and care, patience and great attention to what conscious changes in our institutions and our community-based organizations and circles will mean. We accompany donors and their advisors during this cultural shift from greed to greatness.

Staff



Director, Founder: Tracy Gary

Tracy Gary is a philanthropist, non-profit entrepreneur and legacy mentor who has worked tirelessly to help others experience the joy of giving charitable dollars to causes they care about. Tracy Gary is the author of “Inspired Philanthropy: Your Step by Step Guide to Creating a Giving Plan and Leaving a Legacy” (published by Jossey-Bass, Nov. 2007).



Business Manager: Luis Gilberto Rivas

Working with his fourth non-profit, Luis is an experienced operations and systems manager. His twelve year career includes exemplary organizations such as the Girl Scouts of South Texas Council, The Children’s Museum of Houston, and the Houston Area Women’s Center.

Additional Consultants:

Web Maven: **Barbara Brust, Lucille Design**

Accounting Manager: **Elyse Meyer**

Marketing Agent: **Massman and Associates**

Marketing: **Sandra Solomon and Associates**

Consultants



Co-Founder: Jean Russell, Nurture

Jean Russell has been writing about philanthropy and world changing for print and online media since 2003 and editing for 10 years. She founded Nurture, a communications consulting company working with social benefit leaders globally. Nurture.biz



Writer/Interviewer: Karen Payne, Transforming Violence

Karen Payne has worked as a consultant, writer, filmmaker and workshop leader for over 25 years. She is the Co-founder of wild-zone.net and transformingviolence.org



Marketing and PR: Karma Shipman

For over 15 years, Karma Shipman has worked with the nonprofit community: establishing charitable organizations, assessing the needs of established nonprofits, and building boards of directors.



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Board of Directors



Joanne Reich
Chair

She serves as the Child Protection and Community Assistance Officer and Ministries with Women, Children, and Families for the General Board of Global Ministries of the United Methodist Church.



Cindy Ewing
Secretary

She is a feminist, photographer, and philanthropist; and she supports women's work in peace, justice, and social change.



Ernest McMillan

He has devoted his life's work to youth development and community empowerment. Ernest founded the 5th Ward Enrichment Program.



Michael Shannessy

He teaches at Saint Ignatius College Preparatory School in San Francisco, California. Specializing in ethics and leadership training, he has worked with young people for over 30 years.



Stan McDonald

He is a leader in his community as the chairperson of the social committee of his civic association and at-large board member. He is an award winning poet and leader in his family retreats.



Flora Moon
Treasurer

Flora Moon, a strategy and planning consultant, integrates her change management and communication expertise with domain knowledge of media and sustainable development.



Tracy Gary

Nonprofit Entrepreneur & Philanthropic Advisor, she is Executive Director of Inspired Legacies.

Advisory Board



Philip Cubeta
Chair

Phil Cubeta, CLU, ChFC, MSFS, CAP is Chief of Staff of The Nautilus Group.



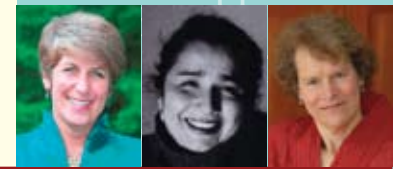
Bob Belkin
IL Founding Board Chair

Marketing/Management Consultant & Legacy Advisor. Co-founder of Planned Giving Associates.

Other Advisors and Partners

Amy Looper, Beth Carls, John Levy, Gerard Senehi, Charles Terry, Randy Ottinger, Ruth Ann Harnisch, Nipun Mehta and Jessica Chao

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Associates



Sondra Shaw-Hardy

Over the past twenty-five years Sondra Shaw-Hardy has founded or co-founded numerous non-profit groups including the Women’s Philanthropy Institute with Martha A. Taylor, as well as several giving circles throughout the United States. Since 1995, she helped create three books about women and philanthropy with two more forthcoming.



Jule Meyer

A Certified Fundraising Executive (CFRE), Jule Meyer brings nearly thirty years of fundraising experience working with national organizations such as Global Impact, RESULTS, and the Bainbridge Graduate Institute. Jule is a principal with Parkman Foundation Services.

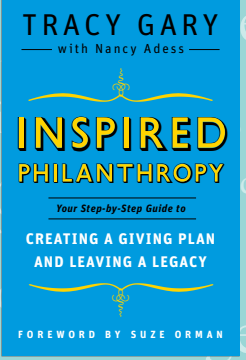
Inspired Wealth Coaches

We believe that inspired wealth coaches can play a crucial role in donors becoming inspired leaders and planners. While many advisors and partners facilitate the legacy planning process, Inspired Wealth Coaches (IWCs), in particular, help donors discover their values and goals, navigate family issues, as well as hold donors accountable for progress.

IWCs are experts on process, and do not, unless otherwise indicated, offer advice on financial tools or options. Here is a small but powerful list of our first Inspired Wealth Coaches.

- Anne and Christopher Ellinger
- Michal Feder
- Renee Freedman
- Tracy Gary
- Pilar Gonzales
- Lori Hanau
- Ruth Ann Harnisch
- Jennifer Ladd
- Jean Russell
- Marjan Sax

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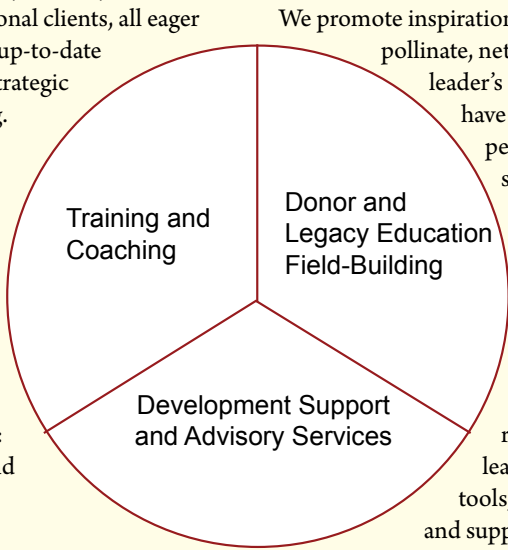
Workshops, Coaching and Training

One-third of our time is spent presenting more than 120 workshops and keynotes a year to approximately 40 institutional clients, all eager for us to present the most up-to-date perspective and tools on strategic giving and legacy planning.

Inspired Legacies is regarded as the largest producer of donor and legacy education materials in the country. Our primary tools have been the three versions of “Inspired Philanthropy” the latest of which is subtitled: “Creating a Giving Plan and Leaving a Legacy.”

We coach advisors and leaders such as those part of “In Know Vision” a network of CPAs, lawyers and wealth advisors, about working more creatively with their clients about philanthropy. This includes speaking at their professional conferences, or visiting their members

regionally for events, and coaching families on giving tools and practices.



We promote inspiration, share new trends, cross-pollinate, network and strengthen leader’s capacities. In 25 years, we have reached nearly 400,000 people, a small but essential slice of those aiming to grow their leadership and giving.

Using the internet and new media tools, we will expand this capacity in 2009 and beyond, reaching next-generation leaders with next-generation tools, while continuing to train and support new donor and legacy education trainers.

* This chart represents Inspired Legacies’ program mix.



Legacy Learning Communities

One-third of our time goes to developing the donor and legacy education sector, or building our field.

Training Trainers

In 2008, we started a program called Train the Trainers. We presented our own tools, heard best practices from others, and offered individualized support. We also set up a list-serve and wiki for about 30 national leaders or trainers to help them cross-pollinate ideas. We plan to offer this training again in 2009 and beyond.

Transforming Philanthropy

Donor Organizing Initiative --with Bolder Giving
With Bolder Giving, Inspired Legacies seeks capacity-building support, and we jointly grow new, bold and more strategic donors nationwide and globally.

Transformational Philanthropy Leadership Group

We participate in monthly and quarterly calls with various groups to support their leadership. This is a study group on transformational giving, an emerging concept.

The Tipping Point Network

This leadership network strives for sustainability, spiritual practice and leadership breakthroughs.

Innovative Philanthropy

Inspiring Youth Giving

Inspired Legacies as a field-builder has helped to map the youth -giving field and is developing tools for those who seek action from the next generation from a social justice perspective.

Youth Giving Circle Curriculum

Being piloted in early 2009, the Youth Giving Circle Curriculum will be available for downloading from our website with training available from our Inspired Legacies team.

The Tipping Point Fund

Inspired Legacies leverages projects we believe are transformative.



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Fundraising Support and

Advisory Services

The final third of our time goes to development and advising on fundraising.

Tipping Point Fund

We seek to help the Season's Fund and the Tipping Point Fund to raise and leverage \$20 million for transformational philanthropy and leadership development.

Women Moving Millions

With the Women's Funding Networks' Development Team, we make capacity building asks from \$100,000 to \$1 million for this important campaign. Over \$110 million has been raised by the team and women's funds since April of 2006.

Other development clients include: Astraea Lesbian Fund for Justice, Childbirth Connections, National Center for Research on Women and The Women's Foundation of California.

Teen Talk

Giving probono support, Inspired Legacies seeks to support these entrepreneurs and leaders to grow a social network on line for teens and preteens that will reach millions and also present new tools on giving and living.

Teleconference Calls on Breakthrough Ideas and Leaders

When good projects and opportunities arise, we alert our constituents and offer teleconference calls to a select list of some 450 funders or prospective donors.



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Inspiring Our Communities: Voices of Leaders of Color*

Leaders of Color have shared with us nationally and locally that they want a community of peers, coaching, and donor partnership to reach mostly high net-worth donors for their full engagement and to share success. In 2009, Inspired Legacies will pilot a program with founding support from the Frees Family Foundation providing donor partners and coaching in Houston.

Resourceful Women of Texas*

From Houston Inspired Legacies will join organizations like the Dallas Women’s Foundation to help women with wealth through peer support and leadership development opportunities.

Inspired Funders of Houston and Texas Donors Network*

We hope to partner with I Live Here I Give Here and several established networks to showcase a statewide website that will enable more sharing between funders, activists, and advisors.

Donor, Family Meeting and Mentoring Workshops, Coaching, and Training

Selectively each year Inspired Legacies works with about 40 families through mentorship,

facilitation or shared leadership. We love seeing the transfer of values through families and we are ideal coaches for children and young adults.

Texas Philanthropic Advisors Network*

Inspired Legacies hopes to partner with others to create a Texas network based on the national Advisors in Philanthropy model. (www.advisorsinphilanthropy.org)

Texas Emerging Practitioners in Philanthropy*

Creating the next generation of grantmakers is essential to the success of our philanthropic sector. EPIP (www.epip.org) national now has over 10 local chapters emerging. We think Texas deserves to have the future of philanthropy guided by intergenerational dialogue and next generation wisdom.

Listening to Legacies

Through video, audio and multi-media, we aim to capture the diverse stories of those who have dreams or are co-creating them for their families and communities.

* in development



Sample Workshop Presentations & Keynotes For Advisors and Donors:

- Creating a Strategic Giving Plan
- Living and Leaving your Legacy
- Unleashing the Generosity Generation
- Transformative Donor Leadership & Giving
- Working with Advisors for Inspired Outcomes
- Intergenerational Giving: Sparking the Giving Impulse
- Women as Family Legacy Weavers and Money Mentors
- New Trends in Transformative Giving and Donor Leadership
- Choosing and Managing Financial and Estate Planning Advisors
- Inspired Philanthropy: Creating a Strategic Giving and Legacy Plan
- Youth Giving and Youth Giving Circles: New Trends in Creating Change
- Inspired Leadership: Best Practices of Fundraising, and Philanthropic Mentorship
- Community-Based Giving: Donors, Community Leaders and Activists in Partnership

For Families, Nonprofits, Wealth Networks, or Business Roundtables:

- Let's Get Together Before Crisis Hits
- Donor Intent: Inspiring Generosity and Financial Independence
- Family Retreats: Facilitating Exchange for Times of Transition
- Venture & Adventure Philanthropy: New Trends in Excellence
- Getting Over the Fear of Asking for Major Gifts: Becoming a Donor Partner
- Getting Our Family on the Same Songsheet: 10 Essentials for Wealthy Families
- Raising Money and Leveraging Influence: How to Maximize Your Capacities & Impact
- Inspired Living, Inspired Giving: Advisors, Donors & Nonprofits Working Together for Change
- Becoming an Outstanding Board Member: Keys to Successful Teamwork and Fearless Fundraising
- Philanthropic and Legacy Vehicles: Private Foundations, Supporting Foundations, and Donor Advised Funds
- Family Unity: Creating a Values-Based Family Mission Statement and a Philanthropic and Legacy Statement
- What Every Family Catalyst Needs to Know to Move their Families

This list reflects some of the 2500 groups that Tracy has worked with since 1973

Advisor Networks

Advisors in Philanthropy
In Know Vision
National Committee on Planned Giving

Advising Nonprofits

CompassPoint
Leave a Legacy (multiple sites)
Foraker Group, Alaska
Our Community Network, Australia
Our Giving Community (workplace funds)

Community Based Philanthropic Funds

The Global Fund for Women
GLBT funds
The Funding Exchange
Women's Funds

Community Foundations

The Boston Foundation
The St. Paul Foundation

Corporations

American Express Financial Advisors
The Nautilus Company & New York Life
PNC Bank
Thrivent Lutherans
US Trust Company

Development Professionals

Association of Fundraising Professionals
Women in Development
Women's Philanthropy Institute

Donor Education

Rockefeller/The Philanthropy Project
Social Venture Partners (multiple sites)

Donor Networks

Social Change Foundation, England
Threshold Foundation
Women Donors Network
Women Give!

Networks

Council on Foundations
Executive Presidents
Executive Women's Alliance
Women's Funding Network

Nonprofits and Regional Networks

Alaska Funders Network
Aspen Institute
Associated Grantmakers of Boston
Bioneers
Girl Scouts of America
United Ways

Private Foundations and Trusts

The Falcon Fund
Meyer Foundation, Australia
Reichstein Foundation, Australia

Schools /Universities

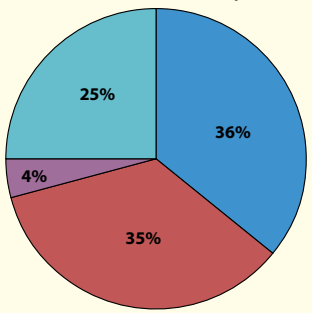
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Kennedy School
University of St. Thomas

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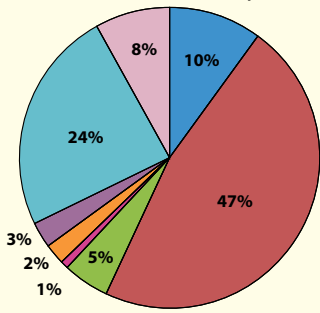
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2006
Total Revenue: \$245,523

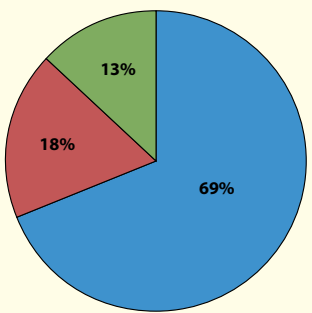


- Individual/Business Contributions
- Foundation/Trust Grants
- Program Service Fees
- Speaker & Workshop Fees
- Nonprofit Organizational Grants
- Publication Marketing Support
- Publication Sales
- Consulting Revenue

2007
Total Revenue: \$375,451

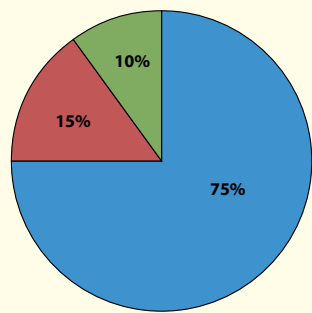


2006
Total Expenses: \$151, 826

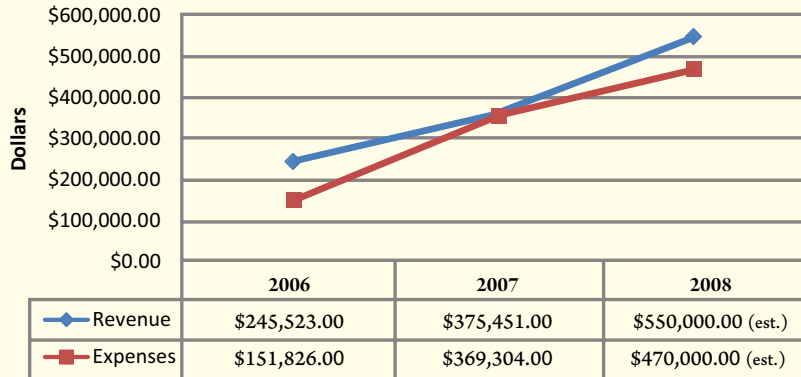


- Program Services
- Management & General
- Fundraising

2007
Total Expenses: \$369,304



Revenue and Expenses



In addition to the many mentioned within this report who have contributed to the creation and success of Inspired Legacies, we also thank Beth Tudor, Bonnie Kell, Dwayne Bennett, Jeff Grossberg, Julie Silber, Gary Massman, Margaret Foster, Michelle Melrose, Nancy Adess, Rich Polt and Louder than Words, Rick Russell, Rick Wilcox, Robin Pfeil, Tori Williams, Tim Feder, Vann Vaughn and many others who have volunteered or as consultants moved our work forward.

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Thank you to our January 2006-September 2008 donors:

Grant Abert
 Margie Adam
 Alvin Baum
 Jean J. Beard
 Bob & Marguerite Belkin
 Elisabeth Bosch
 Michael Campbell & Katherine Grover
 Capital Missions Company
 Chambers Family Fund
 The Chutzpah Fund
 The Community Foundation
 Co-Op America
 Cristina Callan Charitable Trust
 Katie & Phil Cubeta
 Quinn Delaney & Wayne Jordan
 Abigail Disney & Pierre Hauser
 East Bay Community Foundation
 Anne & Christopher Ellinger
 Cindy Ewing
 Falcon Fund
 Michal & Richard Feder
 Sonia Feder
 Mary Ford
 The Frees Family Foundation
 Tracy Gary
 Helen Gemmill
 The Gratitude Fund

Global Greengrants
 Gone Giving Fund
 Sondra Shaw-Hardy
 Ruth Ann Harnisch
 Harnisch Family Foundation
 The Horowitz Family Philanthropic Fund
 Trish & Reilly Houck & Lyssa Jenkins
 Houck Family Foundation
 Helen L. Hunt
 John Hunting
 Institute for International Investors
 Jewish Community Endowment Fund
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 Kathy Levinson
 Rebecca Liebman & Charles Stephens
 Kim Lund
 Nancy Meyer & Marc Weiss
 Micro Grants
 Flora Moon
 Marilyn Morrissey
 Tom Moroz

Virginia Mudd & Clifford Burke
 NY Life/The Nautilus Group
 New Hampshire Charitable Foundation/We Have Your Trust Fund
 Martha Newell
 Open Society Foundation
 Lisa V. Parker
 CoYoTe PhoeNix
 Joanne Reich
 Lynne Rosenthal
 Margaret Schink
 Gerard Senehi
 Molly Stranahan
 Bente Strong
 Sandra Scurria, MD
 Sunshine Fund of the Boulder Community Foundation
 Swanee Hunt Family Foundation
 US Trust Company
 Vermont Community Foundation
 Léonie Walker & Kate O'Hanlan
 Marion Weber
 The Welk Family Foundation
 Martha Easter-Wells
 Wheelock Whitney
 Tori Williams
 and 5 anonymous clients

Our apologies for errors or omissions, please contact us at 713.527.7671.

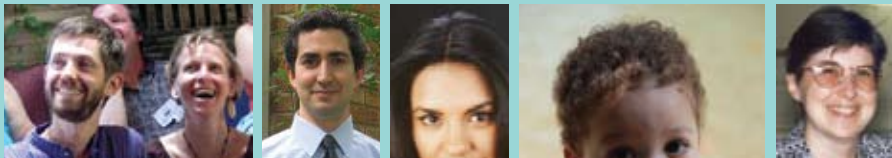
Invest with us for a bold future

As a donor, donor educator, philanthropic advisor, nonprofit, advisor, or advisor network:

1. Partner with us
2. Sponsor Inspired Legacies through your organization or as an individual
3. Make a donation to support our collective work
4. Become an Associate
5. Fund Donor Education
6. Get training to be a Donor Educator
7. Hire Inspired Legacies to present at your event
8. Make a lifetime or legacy gift that is bold, strategic and brilliant! And call us for support!
9. Work with Inspired Legacies on your family giving
10. Attend Inspired Legacies events
11. Use our resources on InspiredLegacies.org
12. Read *Inspired Philanthropy*
13. Read our newsletters, contribute stories, and give us feedback
14. Tell your friends, family and philanthropic network about our work
15. Call or email us to find out more ways we can collaborate or serve you

Call us to get involved! 713.527.7671 or email info@inspiredlegacies.org





Unleashing Generosity

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Join us in co-creating an inspiring future!

Credit:

Project Lead:

Jean Russell

Project Associate:

Lorrie Lampson

Design:

Rick Russell

Editing:

Carol Rust and Karma Shipman

Financials:

Luis Gilberto Rivas

Director and Author:

Tracy Gary

