

National Planned Giving Institute

National Planned Giving Institute Records

1993-2000

Title Statement

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Author: Special Collections Staff.

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Descriptive Summary

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English

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Repository

Special Collections Research Center

Administrative Information

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Historical Note:

According to its brochures and newsletters, the National Planned Giving Institute at the College of William and Mary was "founded in 1967 [and] was given to the College of William and Mary in 1993 by Robert F. Sharpe & Company, Inc."

"The College of William and Mary National Planned Giving Institute offers a series of four seminars covering all aspects of gift development through major current and deferred planned giving. The Institute puts the donor at the heart of the planned giving process, while providing gift planners with the knowledge and tools to enable donors to plan for their future while benefiting the charities they love. The curriculum includes the fundamentals that every gift planner must know to succeed, as well as introduces advanced gift planning, marketing and cultivation strategies. The latest knowledge, research, and trends in all aspects of planned giving is also incorporated in the seminars. The Institute, founded in 1967, has provided comprehensive education in the field of planned giving to thousands. You can gain a new perspective on charitable gift planning and move your planned giving program in a new direction by enrolling in these seminars."

The Institute has since left the College of William and Mary and is now the Sharpe Group. For more information about the Sharpe Group, please see <http://www.sharpenet.com/>.

Further information about this individual or organization may be available in the Special Collections Research Center Wiki: http://scdbwiki.swem.wm.edu/wiki/index.php/National_Planned_Giving_Institute.

Scope and Contents

This collection contains brochures, booklets, programs, and other published material describing fundraising or development seminars, conferences, and similar programs operated by the National Planned Giving Institute at The College of William and Mary. According to its brochures and newsletters, the National Planned Giving Institute at the College of William and Mary was "founded in 1967 [and] was given to the College of William and Mary in 1993 by Robert F. Sharpe & Company, Inc." The Institute has since left the College of William and Mary and is now the Sharpe Group. For more information about the Sharpe Group, please see <http://www.sharpenet.com/>.

Related Materials:

Office of University Development Records (UA 126) contains information about fundraising.

Keywords

Booklets
Fliers (printed matter)
Fundraising campaigns
Gifts and Bequests

Custodial History:

Description of Subordinate Components

National Planned Giving Institute

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Unit ID /repositories/2/archival_objects/339224

Unit Date 1993-1994

Mixed Materials 1 (Box)

Container 1 (Folder)

National Planned Giving Institute

Unit ID id44536

Unit ID /repositories/2/archival_objects/339225

Unit Date 1995-1996

Mixed Materials 1 (Box)

Container 2 (Folder)

National Planned Giving Institute

Unit ID id44537

Unit ID /repositories/2/archival_objects/339226

Unit Date 1997-1998

Mixed Materials 1 (Box)

Container 3 (Folder)

National Planned Giving Institute

Unit ID id44538

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Unit Date 1999-2000

Mixed Materials 1 (Box)

Container 4 (Folder)