

Rebecca Rothey – February 17, 2026 1:00 PM

Critical Relationships in Planned Giving

Presenter: Rebecca Rothey, CFRE, CAP®, AEP®

Duration: 60 minutes

Introduction

Welcome & Objectives

- Importance of donor relationships in planned giving
- Recognizing and navigating external and internal relationships
- The foundation: understanding our relationship with ourselves
- **Overview of Key Relationship Types**
 - **External:** Donors, family, advisors, and other influencers
 - **Internal:** Organizational leadership, finance, colleagues
 - **Self:** Personal values, ethics, and professional growth

External Relationships: Donors & Their Circles

- **Understanding the Donor's Personal Network**
 - Family (spouse, children, parents, pets, and close friends)
 - Honoring legacies and values in philanthropy
 - Key questions to deepen donor conversations
- **Professional & Community Influences**
 - Role of financial advisors, attorneys, and trust officers
 - Impact of religious, business, and personal affiliations

Internal Relationships: Navigating Organizational Dynamics

- **Collaboration Across Departments**
 - Finance, legal, development, and mission-related teams
- **Building Strong Leadership Alignment**
 - Understanding institutional priorities and constraints
 - Ethical stewardship and transparent communication

The Self: Foundation of All Relationships

- **Self-Awareness & Fundraising Success**
 - Influence of personal values, mentors, and experience
 - Authenticity in donor and institutional relationships

Conclusion

- **Key Takeaways & Best Practices**
- **Final Thoughts & Open Discussion**