Contents

Introduction

Note To Readers

Who should read this book

How this book is organized

Chapter One

Agencies of Cash Flow

Chapter Two

Investment Management

Financial Markets

The Three Asset Classes

Inflation

Cash Equivalents (Short-term Interest Rates)

Bonds (Fixed Income)

Stocks (Equity)

Managing Risk - the Efficient Frontier

Spending Policy

Chapter Three

Governance

7 Standards of Care

Investment Policy Statement (IPS)

Restricted Funds

Endowment

Chapter Four

Planned Giving

Tax Status

Annual RMD Strategy & Capital Gain Strategy

Money In Motion

The Estate Process

MIM Category 1: Transfer of Assets at Death

MIM Category 2: Business Transactions

Charitable Gift Annuities, Charitable Remainder Trusts, Charitable Lead Trusts

Conclusion

About the Author

Bibliography