

**LYNDA L. SANDS, J.D., M.B.A.**



**WHO SHE IS:** Lynda L. Sands is a lawyer, consultant, trainer, author and motivational speaker in philanthropic planning. She specializes in strategic designs and solutions for philanthropic transfers of wealth. Her 40+ years of specializing in high net worth philanthropy have provided her with exceptional depth of expertise in solving design issues and asset transfer issues, as well as resolving problematic cases where charitable gifts were not well designed and executed.

**AUDIENCES SHE SERVES:** Lynda serves primarily three groups involved with philanthropy:

**Nonprofits:** Lynda works with fundraising offices, especially major, planned and principal gifts, and with funds administration offices. In addition to providing legal and consulting on donor-donee transactions, she also establishes effective planned giving programs or revamps flailing ones. She creates and implements new donor advised funds and endowment programs for nonprofit clients wishing to add new program components or to enhance existing ones.

**Individuals:** Lynda represents individuals and families in their philanthropic endeavors. She designs and creates charitable trusts, private foundations and new public charities. She also assists in correcting these entities where either they were not created correctly at the outset or the erroneous operation of them threatens serious detrimental consequences to the founders or managers.

**Advisors:** Lynda has always enjoyed working with other advisors to bring them into the field of philanthropy and to help them see how adding philanthropic planning to their business model can greatly enhance their business. It also allows advisors to offer a service to their clients that other advisors ignore or miss, as well as provide a rich offering of planning tools for their clients.

**VALUE TO THE CLIENT AND THE FIELD OF PHILANTHROPY:**

Forty plus years of experience in working with these three groups, writing over 200 articles and more than six books, creating document assembly software, speaking to more than

1,000 audiences, and doing audio and video presentations has allowed Lynda to develop breadth and depth of experience and to share that experience in all forms for so many clients.

She has trained more than 35,000 financial advisors and planned giving officers.

She has initiated, assisted, concluded and joint ventured on well over \$1 billion in charitable gifts, trusts, annuities and foundations. And that number was achieved by 2001 when she stopped counting and just enjoyed continuing on to the present day.

Lynda has served on many nonprofit boards and committees and has learned as much from them as she has brought to them.

**NEW VENTURES:** Not wanting to stand still, Lynda has begun online video training for major gift officers, new planned giving officers, and other nonprofit staff/volunteers who want or need to understand planned giving without becoming a technical expert at it. Plain English Planned Giving is comprised of eight courses each with 8 topics in a coordinated format for easy, quick learning on how to spot potential planned gift opportunities in a donor's life or assets. Each video is 8-15 minutes for convenience of learning.