ACKNOWLEDGMENTS

Thanks are due to the many people who made this guidebook possible.

To all those who have so generously supported our philanthropic services program, and especially to the Daniels Fund, the Triad Foundation, the T. W. Lewis Foundation, and the Sunderland Foundation for their gifts in support of this guidebook.

To the donors, foundation leaders, and philanthropic advisers who shared their experiences and wisdom in interviews, and responded to my continued questions.

To Jeffrey Cain and Paul Rhoads, whose earlier guidebooks on donor intent formed a solid and helpful basis for this work.

To Philanthropy Roundtable colleague David Riggs, Andras Kosaras and Cara Koss of Arnold and Porter, Matthew Elkin and Alexander Reid of Morgan Lewis, Daniel Stuart of Marcus and Shapira, and Lawson Bader of DonorsTrust for their invaluable assistance with the discussion of philanthropic vehicles.

To the Roundtable’s publications team, whose superb editing and graphic design helped make this guidebook a reader-friendly tool for all who use it.

To Adam Meyerson, who read every word of this guidebook over several iterations and improved it each time with his insightful questions and observations.

To expert readers Kim Dennis and Jim Piereson, who gave graciously of their time, thoughtfulness, and encouragement.

And to David Bass, whose outstanding work in conducting over 30 interviews, researching the many aspects of donor intent, and preparing a first draft is evident on every page of this guidebook.

Joanne Florino
Vice president, philanthropic services, The Philanthropy Roundtable