

DEVINE PLANNING

CONTRACT

with not-for-profit organizations in integrating planned giving into existing or new institutional advancement/development programs to build endowments and help provide for the future.

CONSULT

with individuals on estate planning, maximizing estate tax and/or income tax savings while achieving personal/philanthropic goals.

CONSULT

with profits in developing special philanthropic programs to better the community, help them to market the "three C's": confidence, competence and client "centeredness."

REVIEW

and advise not-for-profits on grant applications from a grant making view point with the idea of making the applications more compelling and more complete.

PHILANTHROPIC PLANNING

implementation, and stewardship for individuals and families.

*"To give away money is an easy matter
& in any man's power.*

*But to decide to whom to give it,
and how large and when,
and for what purpose and how,
is neither in every man's power
nor an easy matter."*

-Aristotle

COMMUNITY COMMENTS

"Millie has provided Child and Family with very valuable advice in creating our major gifts program and continues to work with us as we work to grow our endowment."

Tom Gullotta, Director
Child and Family Agency

"As a loyal friend to the Eastern Connecticut Community Foundation since its inception in 1988, Millie Devine has been a constant source of information, support, and advice; and has provided the board of trustees and me with the guidance needed to keep us steadily on course."

Joy Leary

"Ms. Devine has been a frequent resource, adviser and mentor. She has her hand on the pulse of the local nonprofit world and has generously opened many doors for me. Her good will and humor and good sense have become hallmarks for good grantsmanship in this area"

Alice F. Fitzpatrick, Executive Director
The Community Foundation of Southeastern Connecticut

"Mildred E. Devine helped turn two of the region's largest charitable foundations into a power tool for social and cultural development in southeastern Connecticut..."

The Day - New London

"Millie's decades of banking experience in this region and her insights and skill as a "matchmaker" between institutions and their funding sources, make Millie a true community treasure. She is a wonderful teacher and an eager learner, always looking for new ways all of us can make a difference in our community!"

Steve Sigel, Managing Director
The Garde Arts Center

Devine
PLANNING &
PLANNED GIVING, ESTATE PLANNING & GRANT APPLICATION ADVISEMENT

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Devine
PLANNING &
PLANNED GIVING, ESTATE PLANNING & GRANT APPLICATION ADVISEMENT

*To help build a
better community
by providing consultation
for planned giving, development,
estate planning, & grants
application advisement.*



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The making of appropriate, significant charitable contributions is an art. Like any art, it is a living, creative process that adapts to the changing needs and wishes of the donor.

Each year, thousands of people contribute their time, talents, & money to America's charitable, religious, educational, cultural, service, & healthcare organizations. Private philanthropy is the foundation of every charitable endeavor.

Devine Planning can easily assist you in:

- Working with not-for-profit organizations on planned giving and building their endowments.
- Working with individuals on estate planning in order to meet their personal objectives and maximize tax savings.
- Working with corporations in developing special philanthropic programs.
- Working with not-for-profits reviewing grant applications and advising how to make the applications stronger.

PLANNED GIVING TOOLS

Outright Gifts- lifetime or bequests under will/trusts
Cash • Negotiable Securities

GIFTS THAT GIVE BACK

Charitable Remainder Trusts - UNI & Annuity
Charitable Gift Annuities • Pooled Income Funds

GIFTS THAT PASS ASSETS TO HEIRS

Charitable Lead Trusts

OTHER GIFTS

Real Estate
Tangible Personal Property
Closely-held Stock • Life Insurance
Retirement Assets - IRAs and/or 401(k)s
Named Endowment Opportunities

Devine Planning provides professional counsel on philanthropic decision making ...

Mildred E. Devine is a 1960 graduate of Waterford High School, Waterford, CT and received a BA with honors in business administration from Upper Iowa University, Fayette, Iowa. She is a 1973 graduate of the New England School of Banking at Williams College with a major in trust and a 1978 graduate of the National Graduate Trust School at Northwestern University in Evanston, Illinois. She is also a Certified Trust and Financial Advisor (CTFA) and an Accredited Estate Planner (AEP).

Millie has 32 years of trust administration experience most recently with Shawmut Bank (now Fleet) and was responsible for a \$360 million dollar Trust Unit. She was also responsible for estate planning, personal trust administration and business development.

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In addition to personal trust administration and extensive work with individuals in estate planning, Millie has administered private foundations for over twenty years, including the R.S. Gernon Trust, Frank Loomis Palmer Fund, Bodenwein Public Benevolent Foundation & the J. Martin & Caroline S. Leatherman Foundation.

Millie is very involved in civic and professional organizations having served as president of the S.E. CT Estate & Tax Planning Council, Financial Women Int'l., Big Brothers-Big Sisters of S.E. CT, Family Service Assoc. of Southern New London County, American Heart Assoc., past president of New London Rotary, a Paul Harris Fellow, and Corporator, Lawrence & Memorial Hospital. She is a member of the boards: Planned Giving Group of Connecticut, and New London Development Corporation; Member, National Committee on Planned Giving, The Association of Fundraising Professionals/ Connecticut and the first recipient of the prestigious ATHENA Award from the Mystic Chamber of Commerce..

*...helping you help others for
generations to come!*

*For further information
please contact Millie Devine*

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