

How to use this site

Welcome to Planning Perspectives 2.0. This is an interactive website that has been created to educate people interested in the many ways of making a charitable gift.

There are two ways to use this site:

1. You may browse the site **anonymously** without signing up, or
2. You may **Sign up** with just your name, e-mail address and a password to benefit from additional capabilities, **and you will still be anonymous** to anyone until you decide otherwise.

The following information will assist you in deciding which option is best for you. When you sign up and use the features of Planning Perspectives 2.0, a special folder called "My Illustrations" is automatically created just for you, and a second folder for "Bookmarks" is added to the bottom of the page. These provide private and secure places for you to save items that you choose or create on Planning Perspectives, transforming the site into a personal place where you can read, learn, experiment with gift techniques, and plan.

PLEASE NOTE: This site has been designed so that you can maintain complete privacy until you desire to share your intent with our organization, your advisors, or others. Please read our [Privacy Policy](#), and then read "So what can you do?" below, a description of how to use this site to learn more about giving.

So what can you do?

- You can interact with the site by **personalizing the site's stories and "inline" gift examples** with your own name and information so they become yours.
- Any pages you find of interest can be **"bookmarked"** in your own personal folder no one can see.
- You can send any page to a nicely formatted print version so you can **print pages on your printer**.
- You can **send any page to a PDF file** so you can save it offline or email it to others.
- You can customize a calculation or gift story and save it, edit it, or share it with any number of other people so they can come back and view your customized gift story at any time. They can even modify your calculations if you choose to let them do so.
- And you can interact with others by **privately sharing your pages with others** such as your advisors, your family or peers, or our office. A personalized message will be sent to them with a link that will bring them directly to the page you want. And all they need to know is how to read e-mail on their computer and click on a link.

And all of this is private. You are the only one in the world who sees your customized calculations and gift stories until you decide to share them by clicking the share icon at the bottom of the page.

Click **Sign up** to access the full capabilities of Planning Perspectives 2.0 or click on any menu item to the left to simply look around. You can always Sign up by clicking on Sign in at the left of the bottom bar of this site, or if you decide to save an example that you've personalized, you'll be automatically prompted to Sign in.

[Ask for More Information Now](#)

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