



## Episode 9: DEI in Planned Giving with GivingDocs

In episode nine of *Mission + Markets*, [Heather Shanahan](#) and Jade Bristol, chief development officer at [GivingDocs](#), discuss DEI efforts in planned giving and estate planning. GivingDocs is an online estate planning platform designed to help nonprofits improve their planned giving initiatives.

The conversation addresses diversity, equity, and inclusion (DEI) within planned giving and estate planning. Jade discusses the organization's mission to enhance planned giving efforts for nonprofits, and the history of inequity in philanthropy.

Jade and Heather emphasize the importance of authentic conversations, cultural awareness, and empathy when working with diverse donors in the realm of planned giving. Their discussion underscores the crucial mission of nonprofits to make a positive impact through thoughtful and respectful engagement with donors.

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### Resources

Last Episode: [Episode 8: Trends in AI with Blackbaud](#)

[Resources and Insights at GivingDocs.com](#)

[Episode 3: Board Development with YWCA of Greater Charleston](#)

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