



SWEATMAN • WINDEYER • CONSULTANTS

"... Maximize and Manage the Estate Gift ..."

Jasmine Sweatman and David Windeyer have established a consultancy firm to assist charitable organizations in the management of their estate gifts.

"We saw the need for a service that would assist charities who, through their success with their gift planning programs, are now receiving estate bequests. Many charities require assistance in monitoring the complexities of a modern estate administration to maximize the benefits to them or to evaluate their current programs. With all of the financial challenges in the markets these days, we knew it would be a critical service to assist the charitable sector."

We provide a full range of services including:

- Auditing a charity's existing system
- Establishing and implementing a gift management system based on the charity's needs and size of their bequest portfolio
- Training and educational sessions to staff, volunteers and board members
- Legal assist program and Account Review Program TM to provide advice as required

Jasmine and David will undertake an initial assessment of your current system and make recommendations to improve the benefit to your organization.

SWC has all the resources to deliver a full range of services that a charity may require for their bequest management.