

Practical Uses of AI in Gift Planning

What Your Colleagues Are Already Doing

Tips, Tricks, and Ideas from the April 30, 2026 Webinar

What People Are Already Using AI For

- Drafting thank-you letters and notecards
- Turning email exchanges into contact reports
- Researching arcane tax and legal issues in planned giving
- Drafting job descriptions and gift agreements (with careful review and editing)
- Transcribing Zoom meetings and converting them into contact reports
- Creating pre-meeting briefings using contact reports, giving history, and LinkedIn profiles
- Recording and summarizing internal meetings, including follow-up items and next agenda
- Adding reminders and next steps in Outlook from contact reports (via CoPilot)

Prompting Strategies Worth Trying

- "Start with a human and end with a human" -- bookend your AI use with your own judgment
- After your main prompt, ask: "Is there anything I've missed or haven't thought about?"
- If you restrict AI to a single source (e.g., IRS only), still verify the output -- AI can hallucinate confidently even with constraints
- When working with donor information, remove PII before prompting, then reinsert carefully after

Practical Tips for Better Results

- AI output is a first draft. All work -- especially tax, legal, and gift agreement content -- needs human review before use
- Different platforms have different strengths: explore Claude, ChatGPT, and Gemini to see what fits your workflow
- If your organization has a closed/enterprise AI system, use it for anything involving confidential donor data
- For branded visual content (event materials, templates), image-capable AI tools can be a starting point -- but expect to refine
- Starting with a new AI platform means rebuilding context about your tone and work style -- give it a few sessions

Questions the Field Is Still Working Through

- How to handle PII in prompts when a closed system isn't available
- Whether the time savings from AI justify the extra steps of removing and reinserting personal information
- Ethical considerations: job displacement, environmental cost of AI, and how to talk about them honestly
- Platform differences -- which AI is best for which tasks -- are still evolving

Compiled and created by Claude from attendee chat and Q&A submissions. This document is for informational sharing only.