December 2011

Curriculum Vitae

Name:	Paul G. Schervish
Current Position:	Professor, Department of Sociology Director, Center on Wealth and Philanthropy (Formerly, Social Welfare Research Institute) Boston College Chestnut Hill, Massachusetts 02467-3807
Date of Birth:	April 6, 1946
Place of Birth:	Detroit, Michigan
Home Address:	37 Pilgrim Road Belmont, Massachusetts 02478
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Education:

Graduate:	University of Wisconsin, Madison Ph.D., Sociology, August 1980 The Jesuit School of Theology at Berkeley M.Div. (Master of Divinity), June 1975

	Northwestern University M.A., Sociology, August 1970
Undergraduate:	University of Detroit A.B., Classical Literature, June 1968 Summa Cum Laude
Secondary:	University of Detroit Jesuit High School Diploma, June 1964 First Honors

Doctoral Studies:

Dissertation:	*Vulnerability and Power in Market Relations: The Structural Determinants of Unemployment*
Minor:	Economics

Appointed Visiting Positions:

National University of Ireland, Cork:	Fulbright Research Scholar 2000-2001 Academic Year
Indiana University Center on Philanthropy:	Distinguished Visiting Professor 1999-2000 Academic Year
Harvard University:	Visiting Scholar, Department of Sociology September 1987 - August 1988
Indiana University Center on Philanthropy:	National Research Fellow 2004-2009

Research Positions:

Boston College:	Director, Center on Wealth and Philanthropy September 1984 - present

	Senior Research Associate, Social Welfare Research Institute (now Center on Wealth and Philanthropy) September 1980 - August 1984
University of Wisconsin, Madison:	Research Assistant, Department of Sociology and Institute for Research on Poverty • Fellowship, Institute for Research on Poverty, December 1977 – August 1979 • Professor Gunnar Myrdal, August 1977 - December 1977 • Professor Aage B. Sørensen, January 1976 - August 1977 • Professor Gene F. Summers, September 1975 - January 1976
Jesuit Project for Third World Awareness:	Political and social analysis of Peru Summer 1973 and July - December 1974

Previous Employment:

Instructor of Sociology, John Carroll University, Cleveland, Ohio, September 1970 - August 1972

Community Organizer, Central Toledo Action Committee, Summer 1972

Staff Assistant, Office of Hon. Robert F. Drinan, U.S. Congress, Summer 1971

Major Research Projects:

Multi-Regional Policy Impact Simulator (Senior Research Associate). Development of complete economic micro-simulation model of U.S. economy. Developed by staff of the Social Welfare Research Institute. 1980-83.

New England Unemployment Study (Co-Director). A two-wave longitudinal survey of 120 unemployed workers and their spouses concerning the economic and personal consequences of unemployment. Completed October 1984.

Michigan Auto Worker Study (Co-Director). A survey of a random sample of 320 laid-off auto workers in Michigan and a case study of 110 displaced auto-industry workers from Adrian, Michigan. Final report completed December 1984.

The Study on Wealth and Philanthropy (Director). A three-year study on the philanthropic orientations and practices of wealthy individuals sponsored by the T. B. Murphy Foundation Charitable Trust. Intensive interviews were conducted with 130 wealthy individuals. January 1985-August 1988.

Studies in Economic Morality (Director). A set of research activities focusing attention on the cultural aspects of economic behavior, especially relating to issues of economic morality and economic virtue. Sponsored by the T. B. Murphy Foundation Charitable Trust. September 1988-August 1991.

The Contradictions of Christmas: Troubles and Traditions in Culture, Home, and Heart (Director). The study aimed to bring together a substantial number of researchers, especially among Boston College faculty and graduate students, in the development and execution of an interdisciplinary study of the social, economic, historical, psychological, financial, theological, and literary aspects of Christmas. Sponsored by the T. B. Murphy Foundation. September 1991-95.

Study of Philanthropic Giving and Volunteering in the United States (Director). A multi-year research project examining the multivariate determinants of giving and volunteering sponsored by the Lilly Endowment, Inc., the T. B. Murphy Foundation, and the Center on Philanthropy, Indiana University. September 1991-August 1995.

Evaluation of National Survey Data on Giving and Volunteering (Co-Director). A two-year examination of the procedures, methods, sampling, reporting, and validity of the information on charitable giving and volunteering in the United States sponsored the W. K. Kellogg Foundation. September 1994-August 1997.

Boston Area Diary Study (Co-Director). A 1995 calendar year study of 44 households who were called weekly to report the time, money, and emotional support that they either gave to or received from family, friends, and charitable organizations. This information was used to chart the formal and informal social relations around which care becomes mobilized. Sponsored by the W. K. Kellogg Foundation. September 1994-August 1997.

The National Diary Study of Giving and Volunteering (Co-Director). An eighteen-month project to collect and analyze information collected daily from a national sample of individuals on their giving and receiving of time, money, and emotional support. A different panel of 25 individuals was interviewed over the course of 52 weeks. The research was conducted in conjunction with the University of Arizona. Sponsored by the W. K. Kellogg Foundation. March 1995-March 1998.

Philanthropy and the Spiritual Horizon of Wealth (Director). A multi-year research effort to analyze survey and interview data regarding the patterns and spiritual foundations of charitable giving, especially among the affluent and wealthy. Sponsored by the T. B. Murphy Foundation. September 1996-December 1999.

Identification and Association: The Spiritual Foundations of *Caritas* and the Empirical Dynamics of Charity (Co-Director). The purpose of this research was to (1) elaborate new thinking about the theoretical meaning of care as identification, (2) conduct sophisticated empirical analyses to test and develop this theoretical perspective, and (3) set out the practical implications for several aspects of charitable giving and community life. Sponsored by the Lilly Endowment, Inc. December 1996-December 31, 2000.

1998 Study on Wealth with Responsibility (Co-Director). This study sponsored by Bankers Trust Private Banking was supervised by researchers at the Boston College Social Welfare Research Institute and at the University of Massachusetts at Boston Center for Survey Research. The purpose of the research was to develop a base of knowledge about the attitudes and practices of wealth holders, particularly as they relate to contributions to the well-being of others. Areas addressed in the survey included charitable giving and volunteering, attitudes about social issues, socially responsible investing, trust and estate planning, and the transfer of values to heirs. Thirty-minute mailed questionnaires were sent to 400 wealth holders with a net worth of $5 million or more. January 1998-June 2000.

The Elementary Forms of the Spiritual Life: New Models and Measures of the Daily Dynamics of Spirituality (Co-Director). Through literature reviews, focus groups, and intensive interviews, SWRI worked to develop a set of survey and interview questions that enabled SWRI researchers and others to explore the unconventional, yet generative, definitions and dynamics of spirituality by which people monitor, revise, and guide their lives. January 1998-December 1999.

The Spirituality of Wealth and Philanthropy (Co-Director). This project is an offshoot from The Elementary Forms of the Spiritual Life. Through focus groups and personal interviews, this project seeks to discover and communicate knowledge about the spirituality or guiding principles that inspire and console, or challenge and vex, wealth holders as they chart the use of their wealth for themselves, their families, and the well-being of others. Begun as an exploratory study in 1998, it is now incorporated into most recently funded projects.

Wealth Transfer Microsimulation Model (Co-Director). This project studies wealth transfer and the implications for charitable giving using estimates produced by a first-of-its-kind Wealth Transfer Microsimulation Model developed at SWRI. Continuing work is focused on refining the estimates and on elaborating strategies by which fundraisers and financial advisors can guide wealth holders to shift even greater portions of their net worth to charity in the form of both inter-vivos giving and bequests. June 1998 – present.

Millionaires and the Millennium: The Emerging Material and Spiritual Determinants of Charitable Giving by Wealth Holders (Director). This research continues the research agenda undertaken in the project, "Identification and Association: The Spiritual Foundations of *Caritas* and the Empirical Dynamics of Charity." The principal objectives of the proposed research are to: (1) investigate the emerging trends in wealth and philanthropy; (2) explore the material and spiritual determinants that motivate charitable giving by wealth holders; (3) implement strategies for encouraging charitable giving by wealth holders; and (4) disseminate the findings. January 1, 2001 – December 31, 2003.

The Philanthropic Strategies of High-Tech Donors/2001 Study (Director). This study was sponsored by the Association of Fundraising Professionals (AFP) and funded by Dr. Robert B. Pamplin, Jr., President and CEO of the R. B. Pamplin Corporation. The study carried out intensive interviews with 30 high-tech wealth holders in order to learn their attitudes and practices regarding philanthropy. The leading question was whether and in what ways high-tech donors differ from more traditional models in how they think about and conduct their philanthropy. December 2000 - April 2001.

The Material and Spiritual Dynamics of Wealth: Dilemmas and Decisions Surrounding the Accumulation and Distribution of Financial Resources (Director). This research continues our study of wealth and philanthropy with a particular focus on exploring the material and spiritual decision-making dynamics of wealth holders that surround their accumulation and distribution of financial resources; on working more with wealth holders in order to explore and communicate a spirituality of wealth transfer that relates specifically to those who are financially secure; and on developing strategies for encouraging wise financial decision-making by wealth holders. 2000 – continuing.

The Will of God and Wealth: The Varieties of Religious Discernment and Discerned Philanthropy (Director). This research explores the several faith traditions that have shaped the understanding and practice of discernment, especially as applied to decisions about allocating money and wealth in accord with what can be broadly called the will of God. The research will also draw out the practical implications of discernment and discerned philanthropy to increase the quantity and quality of philanthropy. September 1, 2003 – August 31, 2006.

African American Wealth Transfer Study (Co-director). This study examined and reported on the level and distribution of wealth, the projected wealth transfer and charitable bequests, and the amount of inter-vivos giving for African Americans for the years 2001-2055. June 2004 – October 2004.

St. Louis Metropolitan Area Wealth Transfer Study (Co-director). This study examined and reported on the level and distribution of wealth, the projected wealth transfer and charitable bequests, and the amount of inter-vivos giving in the St. Louis metropolitan area for the years 2001-2055. July 2004 – October 2004.

Geography and Generosity: The Boston Area and Beyond (Co-director). The objective of this study is to make an unbiased scientific assessment of how the reported findings about Boston and the region's lack of philanthropic generosity have been derived, whether the findings are valid, and to construct valid comparative indices for metropolitan areas, states, and regions of the U.S. September 1, 2004 – August 31, 2006.

The Survey on Wealth, Values, and Philanthropy: The Joys and Dilemmas of Wealth (Co-director). A national survey of wealth holders with net worth of $25 million or more, funded by the Bill and Melinda Gates Foundation and Wachovia//Calibre Financial Services. The goal of the study is to generate unique and hard to obtain knowledge—

about the attitudes and practices of ultra high net worth individuals, especially concerning family dynamics, financial planning, and philanthropy—which can be translated into understandings, practices, self-reflection, and discussions that will advance philanthropy and the practice of financial advisement. January 2006 – January 2010.

Wealth Transfer and Potential for Philanthropy in North Dakota (Co-director). A study which used a new and expanded version of the Wealth Transfer Microsimulation Model (WTMM) specially calibrated to the state of North Dakota to derive the findings concerning the level and distribution of household wealth, the amount and distribution of wealth transfer, and the amount and distribution of charitable giving in North Dakota.

The Golden Age of Philanthropy Still Beckons: National Wealth Transfer and Potential for Philanthropy Technical Report (Co-director). A research study which updated and extended our Wealth Transfer Microsimulation Model (WTMM) and used it to produce new estimates of wealth transfer and household charitable giving for the 20-year period of 2007 through 2026 and also for the 55-year period from 2007 through 2061.

Household Giving for the State of Rhode Island: Pre and Post Recession Pattern Trends (Co-director). The objective of this study is to develop detailed estimates of both the religious and secular patterns of giving by income and socio demographic grouping for households in the state of Rhode Island. June 2001 – January 2012.

Rhode Island Wealth Transfer Study.(Co-director).The objective of this study is to develop detailed estimates by microsimulation at various growth scenarios of the transfer of personal wealth from 2007 through 2061 for the state of Rhode Island. October 2011 – January 2012.

Wealth Transfer and Household Wealth Study for the State of Florida (Co-director). This is a study to estimate the wealth transfer of residents of Florida, qualifying counties and county grouping. 2012.

Wieler Family Foundation: Seminar and Research Project. Established in 2011 by The Wieler Family Foundation for $100,000 to Boston College Center on Wealth and Philanthropy for the period November 2011 to May 2015. The gift will support The Scott A. Wieler '81 and Mary Baily Wieler Seminar on Philanthropy for the Center for Wealth and Philanthropy to be held in spring 2013.The remaining $50,000 of this pledge is designated for current use funding for the Center for Wealth and Philanthropy to be used at discretion of the director of the Center.

Grants and Contracts:

Boston College Summer Research Grant, 1981.

Boston College Small Research Grant, Spring 1983.

Michigan Auto Workers Study
Office of Automotive Industry Affairs of the Department of Commerce (with Barry Bluestone), November 1, 1983 - October 31, 1984.
$55,000

Boston College Summer Research Grant, 1984.

The Study on Wealth and Philanthropy
T. B. Murphy Foundation Charitable Trust, January 1, 1985 - August 31, 1988.
$350,000

Studies on Financial Morality
T. B. Murphy Foundation Charitable Trust, September 1, 1988 - August 31, 1989.
$97,000

Studies on Financial Morality
T. B. Murphy Foundation Charitable Trust, September 1, 1989 - May 31, 1991.
$79,000

Dissertation Fellowship (for Andrew Herman)
Indiana University Center on Philanthropy, 1991.
$12,000

Contradictions of Christmas: Troubles and Traditions in Culture, Home, and Heart
T. B. Murphy Foundation Charitable Trust, September 1, 1991 - August 31, 1992.
$236,300

Study of Philanthropic Giving and Volunteering in the United States
Lilly Endowment, Inc., September 1, 1991 - September 31, 1992.
$21,700

Contradictions of Christmas: Troubles and Traditions in Culture, Home, and Heart
T. B. Murphy Foundation Charitable Trust, September 1, 1992 - August 31, 1994.
$171,000

Multivariate Analysis of Philanthropic Giving
Indiana University Center on Philanthropy, October 1, 1992 - December 31, 1993.
$23,310

Analysis of 1990 U.S. Census Data on Nonprofit Employment
Ford Foundation under subcontract to The New School for Social Research, November 1993 - March 1994.
$1,500

Research on Philanthropy and on Contradictions of Christmas
T. B. Murphy Foundation Charitable Trust, September 1, 1994 - August 31, 1996.
$108,631

<u>Evaluation of National Data on Giving and Volunteering and The Boston Area Diary Study</u> (with John J. Havens)
The W. K. Kellogg Foundation, September 1, 1994 - August 31, 1996.
$107,986

<u>Boston Area Diary Study on Giving and Volunteering</u> (with John J. Havens)
The W. K. Kellogg Foundation, March 1, 1995 - August 31, 1996.
$37,000

<u>Philanthropy and the Spiritual Horizon of Wealth</u> (with John J. Havens)
T. B. Murphy Foundation Charitable Trust, September 1, 1996 - May 31, 2000.
$400,000

Boston College Faculty Fellowship. September 1, 1997 - August 31, 1998.

<u>Identification and Association: The Spiritual Foundations of Caritas and the Empirical Dynamics of Charity</u>
The Lilly Endowment, Inc., December 1, 1996 - December 31, 2000.
$399,393

<u>The Material and Spiritual Dynamics of Wealth: Dilemmas and Decisions Surrounding the Accumulation and Distribution of Financial Resources</u>
T. B. Murphy Foundation Charitable Trust, January 1, 2000 – present.
$600,000 funding through 2006

<u>Millionaires and the Millennium: The Emerging Material and Spiritual Determinants of Charitable Giving by Wealth Holders</u>
The Lilly Endowment, Inc., January 1, 2001 – December 31, 2003.
$510,000

<u>The Will of God and Wealth: The Varieties of Religious Discernment and Discerned Philanthropy</u>
The Lilly Endowment, Inc., September 1, 2003 – August 31, 2006.
$350,000

<u>African American Wealth and Wealth Transfer Study</u>
21st Century Foundation, June 2004.
$10,000

<u>Metropolitan St. Louis Wealth Transfer Study</u>
Metropolitan Association for Philanthropy, August 2004.
$10,000

<u>North Dakota Wealth Transfer Study, January 2006</u>
The Impact Foundation
$10,000

Boston Metropolitan Wealth Transfer Study, July 2005
The Boston Foundation
$10,000

Geography and Generosity: The Boston Area and Beyond
The Boston Foundation, September 1, 2004 – August 31, 2005.
$70,000

Geography and Generosity: The Boston Area and Beyond
The Boston Foundation, October 1, 2005 – September 30, 2006.
$105,000

The Washington D.C. Metropolitan Area Wealth Transfer Study, January 2006
Chevy Chase Trust
$10,000

Creating a Culture of Philanthropy
The Bill and Melinda Gates Foundation October 1, 2006 – September 30, 2009
$600,000

Survey and Analysis of Spend-Down Plans among Ultra High Net Worth Families
Aspen Institute
$15,000

The Survey on Wealth, Values, and Philanthropy
Wachovia/Calibre Financial Services
$94,500.

The Survey on Wealth, Values, and Philanthropy
John Templeton Foundation
$100,000

2010

Update for Wealth Transfer Microsimulation Model
Impact Foundation
$85,000

Sponsoring the Center on Wealth and Philanthropy's Communications
Silver Bridge (Wealth Management Advisors)
$10,000

Eaton Vance Philanthropic Services
Sponsoring the Center on Wealth and Philanthropy's Research
$5,000

Association of Fundraising Professionals and Legacy Consultants

Research on Post-Boomer Charitable Giving
$10,000

Lady Sunshine Foundation
Learning by Giving Program for undergraduate students
$10,000

2011

Household Giving for the State of Rhode Island: Pre and Post Recession Patter Trends
The Rhode Island Foundation
$50,000

Rhode Island Wealth Transfer Study
The Rhode Island Foundation
$25,000

Lady Sunshine Foundation
Learning by Giving Program for undergraduate students
$40,000 2010-2013

2012

Florida Wealth Transfer Study
Florida Philanthropic Network
$50,000 January 2012 through May 2012

Sponsoring the Center on Wealth and Philanthropy's Communications
Silver Bridge (Wealth Management Advisors).
$5,000

Eaton Vance Philanthropic Services
Sponsoring the Center on Wealth and Philanthropy's Research
$5,000

Books:

The Structural Determinants of Unemployment. New York: Academic Press, 1983. Honorable Mention, Alpha Sigma Nu, National Jesuit Honor Society, Book Competition, 1984.

Taking Giving Seriously. With Obie Benz, Peggy Dulany, Thomas B. Murphy, and Stanley Salett. Indianapolis: Indiana University Center on Philanthropy, 1993.

Wealth in Western Thought: The Case for and Against Riches. Editor. Westport, CT: Praeger, 1994. A series of seven essays by scholars from a range of disciplines analyzing the varied cultural consciousness of wealth from the vantage point of scripture, ethics, classical and Reformation literature, history, economics, and sociology. Each essay explores an aspect of the complex and often contradictory cultural inheritance of economic sentiment, feeling, and belief that frames the culture of wealth in contemporary America.

Gospels of Wealth: How the Rich Portray their Lives. With Platon E. Coutsoukis and Ethan Lewis. Westport, CT: Praeger, 1994. Twelve first-person narratives by the wealthy about their lives drawn from the interviews conducted for The Study on Wealth and Philanthropy. In addition to the transcripts, the book contains an introductory essay on "The Wealthy and the World of Wealth," a short thematic introduction to each narrative, and a concluding essay on interpreting autobiographical narratives.

Care and Community in Modern Society: Passing on the Service of Care to the Next Generation. Editor with Virginia A. Hodgkinson and Margaret Gates. San Francisco: Jossey-Bass, 1995. Twenty-two original essays by scholars and practitioners examining the intergenerational transmission of care and philanthropic orientations. Introduction, Chapter 3, and Section introductions by Paul G. Schervish.

The Will of God and Wealth: Discerning the Use of Riches in the Service of Ultimate Purpose. With Keith Whitaker. Indiana University Press. Indianapolis: 2010.

The Inner Life of Learning to Give. Spiritual biographical essays written by undergraduates enrolled in the Learning by Giving course taught by Paul Schervish at Boston College and funded by The Lady Sunshine Foundation. (In progress)

Research Volumes and Reports:

Contributor, *Literature Review for the Partial Response Version of the Multi-Regional Policy Impact Simulation Model*. With the staff of the Social Welfare Research Institute of Boston College, the Multi-Regional Planning Staff of the Massachusetts Institute of Technology, and Sistemas, Inc., Washington, D.C., 1981.

Project coordinator and contributor, *Research Strategy for the Multi-Regional Policy Impact Simulation Model*. With the staff of the Social Welfare Research Institute of Boston College, the Multi-Regional Planning Staff of the Massachusetts Institute of Technology, and Sistemas, Inc., Washington, D.C., 1981.

The Unemployment and Re-Employment Experiences of Michigan Auto Workers. With Avery F. Gordon and Barry Bluestone. Report on the Michigan Auto Industry Worker Study submitted to the Office of Automotive Industry Affairs of the U.S. Department of Commerce and to the Transportation Systems Center of the U.S. Department of Transportation, December 4, 1984.

Empowerment and Beneficence: Strategies of Living and Giving Among the Wealthy. Final Report: The Study on Wealth and Philanthropy. With Andrew Herman. Presentation of findings from the Study on Wealth and Philanthropy submitted to the T. B. Murphy Foundation Charitable Trust, July 1988.

Our Daily Bread: Findings from the First Diary Study on Giving and Receiving Care. With John J. Havens. Research report on the findings from interviews three to four times a month for a year with Boston area residents concerning their patterns of giving and receiving financial and in-kind assistance, volunteer time, and emotional support. Social Welfare Research Institute, Boston College, November 1996.

Comparisons Between Gallup / IS and Boston Area Diary Study Data: Report of Findings. With John J. Havens. An analysis of the validity of the Independent Sector / Gallup Organization Survey of Giving and Volunteering. Using a repeat-measure design, the report indicates substantial measurement error due to the Gallup survey methodology. Social Welfare Research Institute, Boston College, March 31, 1997.

Empirical Findings on Charitable Giving: A Topical Literature Review. With Platon E. Coutsoukis. Social Welfare Research Institute, Boston College.

Millionaires and the Millennium: Prospects for a Golden Age of Philanthropy. With John J. Havens. A research report describing the methods, findings, and implications of our Wealth Transfer Microsimulation Model estimates of the level of wealth transfer and bequests for 20 years (1998 - 2017) and 55 years (1998 - 2052). Social Welfare Research Institute, Boston College, 1999.

Wealth with Responsibility / 2000. With John J. Havens. Social Welfare Research Institute, Boston College. Published by Bankers Trust Private Banking, Deutsche Bank Group, New York, August 2000.

The Mind of the Millionaire: Extended Report on the Bankers Trust Study on Wealth with Responsibility / 2000. With John J. Havens. March 2001.

Agent-Animated Wealth and Philanthropy: The Dynamics of Accumulation and Allocation Among High-Tech Donors. With Mary A. O'Herlihy and John J. Havens. Social Welfare Research Institute, Boston College and the Association of Fundraising Professionals, Washington, D.C. April 2001.

Why the $41 Trillion Wealth Transfer Estimate Is Still Valid: A Review of Challenges and Questions. With John J. Havens. Social Welfare Research Institute, Boston College, January 6, 2003.

2003 Survey of Planned Giving Vehicles. John J. Havens, Paul G. Schervish, and Mary A. O'Herlihy. Social Welfare Research Institute. Boston College. June 2003.

Metropolitan St. Louis Wealth Transfer Study. With John J. Havens. Center on Wealth and Philanthropy. Boston College. October 2004.

African American Wealth and Wealth Transfer Study. With John J. Havens. Center on Wealth and Philanthropy, Boston College, October 2004.

Geography and Generosity: Boston and Beyond. With John J. Havens. Prepared for the Boston Foundation's Forum, Understanding Boston. Center on Wealth and Philanthropy. Boston College. November 8, 2005. http://www.bc.edu/cwp

North Dakota Wealth Transfer Study. With John J. Havens. Center on Wealth and Philanthropy. Boston College. January 2006.

Boston Metropolitan Wealth Transfer Study. With John J. Havens. Center on Wealth and Philanthropy. Boston College. May 2006.

Greater Washington, D.C. Wealth Transfer Study. With John J. Havens. Center on Wealth and Philanthropy. Boston College. June 2006.

Aspirations and Apprehensions: Analysis and Commentary on the Wealth & Giving Forum Survey. Center on Wealth and Philanthropy. Boston College and Wealth & Giving Forum, New York. September 2006.

Center on Wealth and Philanthropy Charitable Giving Indices: Social Indicators of Philanthropy by State. With John J. Havens. Center on Wealth and Philanthropy. Boston College. November 2006.

Geography and Philanthropy: The Dynamics of Charitable Giving in Boston and Beyond. With John J. Havens. Center on Wealth and Philanthropy. Boston College. November 2006.

Geography and Giving: The Culture of Philanthropy in New England and the Nation. With John J. Havens. Published by The Boston Foundation in its Understanding Boston series. June 2007.

Center on Wealth and Philanthropy Charitable Giving Indices: Social Indicators of Philanthropy by State. With John J. Havens. Center on Wealth and Philanthropy. Boston College. May 2008.

Charitable Contributions in North Dakota, Recent Patterns and Trends: Technical Report. With John J. Havens. Prepared for and Submitted to the Impact Foundation. Fargo, North Dakota. January 2009.

What's in Store for Philanthropy from the Intergenerational Transfer of Wealth? With John Havens. Center on Wealth and Philanthropy. Boston College. January 2011.

Religious Life and Spirituality Among Wealthy and Ultra Wealthy Households. With John J. Havens. Report presented to the John Templeton Foundation and the Bill and Melinda Gates Foundation. Center on Wealth and Philanthropy. Boston College. March 31, 2011.

The Joys and Hopes, Fear and Anxieties of Wealth. With Robert Kenny and John Havens. Report presented to the John Templeton Foundation and the Bill and Melinda Gates Foundation. Center on Wealth and Philanthropy. Boston College. March 31, 2011.

High Net Worth Households that Make Very High Charitable Gifts: Finding on Four Under-Studied Concepts. . Report presented to the John Templeton Foundation and the Bill and Melinda Gates Foundation. Center on Wealth and Philanthropy. Boston College. March 31, 2011.

Wealth Transfer and Potential for Philanthropy in North Dakota. With John J. Havens. Center on Wealth and Philanthropy. Boston College. November 2011.

The Golden Age of Philanthropy Still Beckons: National Wealth Transfer and Potential for Philanthropy Technical Report. With John Havens. Boston College. January 2012

Published Articles:

"The Labeling Perspective: Its Bias and Potential in the Study of Political Deviance." *The American Sociologist* 8 (May 1973): 47-57. Translated into German by Stefan Mitzlaff for publication in a book on theories of deviant behavior and in *Translations of Summary Articles from Foreign Languages* . Federal Republic of Germany, 1974.

"Chile: The Tragic End to an Experiment in Socialism." With T. Matt Garr. *So It Goes* 2, no. 2 (October 1973): 1-4.

“Timetables and Spiritual Growth,” *Cross and Crown* 26, no. 2 (June 1974): 135-150.

“The Liberation of Ministry.” *Folk Mass and Modern Liturgy* 2, no. 8 (Fall 1975): 12-13.

“A Theory of the Social Relations of Unemployment.” *The Peninsular Papers* 2, no. 2 (Spring 1977): 1-14. Reprinted in the Institute for Research on Poverty Reprint Series, no. 292, University of Wisconsin, Madison.

“Theology of Work: A Liberation Perspective.” With M. Theresa Moser. *Radical Religion* 3, nos. 3-4 (1978): 20-27.

“Employment Problems in a Global Perspective.” In *Growth with Equity*, edited by Mary Evelyn Jegen and Charles K. Wilber. New York: Paulist Press, 1979. 97-123.

“The Structure of Employment and Unemployment.” In *Sociological Perspectives on Labor Markets*, edited by Ivar Berg. New York: Academic Press, 1981. 153-186.

“Political Trials and the Social Construction of Deviance.” *Qualitative Sociology* 7, no. 3 (Fall 1984): 195-216.

“Labor Market Allocation Mechanisms and the Theory of the Reserve Army.” *Research in Social Stratification and Mobility* 4 (1985): 67-85.

“Unemployment as a Transition Status: Micro Evidence for Structural Shifts in the Labor Market.” *Research in the Sociology of Work* 3 (1985): 77-98.

“On the Road: Conceptualizing Class Structure in the Transition to Socialism.” With Andrew Herman. *Sociology of Work and Occupations* 13, no. 2 (May 1986): 264-291.

“Using Adjusted Crosstabulations to Interpret Log-Linear Relationships.” With Robert L. Kaufman. *American Sociological Review* 1, no. 5 (October 1986): 717-733.

“Family Life and the Economy: Graver Responsibilities and Scarcer Resources.” In *Families, The Economy, and the Church*, edited by Frederick H. Brigham, Jr. and Steven Preister. Washington, D.C.: United States Catholic Conference, 1987. 9-25.

“All Creatures Great and Small: Corporatist Structures and Workplace Politics.” With Avery Gordon and Andrew Herman. *Social Problems and Public Policy* 4 (1987): 73-97.

“Variations on a Theme: More Uses of Odds Ratios to Interpret Log-Linear Parameters.” With Robert L. Kaufman. *Sociological Methods and Research* 16, no. 2 (November 1987): 218-255.

“Class Interests and Class Fractions in an Era of Economic Decline.” With Randy Hodson and Robin Stryker. *Research in Politics and Society* 3 (1988): 191-220.

"Wealth and the Spiritual Secret of Money." In *Faith and Philanthropy in America: Exploring the Role of Religion in America's Voluntary Sector,* edited by Robert Wuthnow and Virginia A. Hodgkinson. San Francisco: Jossey-Bass, 1990. 63-92.

"Giving and Getting: Philanthropy as a Social Relation." With Susan A. Ostrander. In *Critical Issues in American Philanthropy: Strengthening Theory and Practice,* edited by Jon Van Til. San Francisco: Jossey-Bass, 1990. 67-98.

"Adoption and Altruism: Those With Whom I Want to Share a Dream." *Nonprofit and Voluntary Sector Quarterly* 21, no. 4 (Winter 1992): 327-350.

"The Dependent Variable of the Independent Sector: A Research Agenda for Improving the Definition and Measurement of Giving and Volunteering." *Voluntas: International Journal of Voluntary and Nonprofit Organizations* 4, no. 2 (August 1993): 223-232.

"Does Generosity Run in the Family?" *Advancing Philanthropy: Journal of the National Society of Fund Raising Executives* 1, no. 1 (September 1993): 26-29.

"The Sound of One Hand Clapping: The Case for and against Anonymous Giving." *Voluntas: International Journal of Voluntary and Nonprofit Organizations* 5, no. 1 (April 1994): 1-26.

"The Moral Biographies of the Wealthy and the Cultural Scripture of Wealth." In *Wealth in Western Thought: The Case for and Against Riches,* edited by Paul G. Schervish. Westport, CT: Praeger, 1994.

"Do the Poor Pay More?: Is the U-Shaped Curve Correct?" With John J. Havens. *Nonprofit and Voluntary Sector Quarterly* 24, no. 1 (Spring 1995): 79-90.

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“The Meaning and Motives of Financial Security: A New Model of Philanthropic Decision-Making Among the Wealthy.” With John J. Havens. Presentation to the 2004 annual meeting of the Association for Research on Nonprofit Organizations and Voluntary Action, Los Angeles, November 20, 2004.

“Geography and Generosity.” With John J. Havens. Presentation to the 2005 annual meeting of the Association for Research on Nonprofit Organizations and Voluntary Action. Washington, D.C., November 18, 2005.

“A Look Back, a Look Forward.” Plenary Presentation at the Center for Philanthropy & Public Policy.” University of Southern California. January 18, 2006.

“Creating a New Generation of Philanthropists: Critical Issues in Donor Education.” Panelist, concurrent session, Center for Philanthropy & Public Policy.” University of Southern California. January 18, 2006.

“Geography and Generosity: Household Determinants of Giving Behavior within States and Metropolitan Areas.” With John J. Havens. Presentation to the 2006 annual meeting of the Association for Research on Nonprofit Organizations and Voluntary Action. Chicago. November 16, 2006.

“New Findings and Trends on the Relationship of Wealth and Income, and Philanthropy.” With John J. Havens. Presentation to the 2006 annual meeting of the Association for Research on Nonprofit Organizations and Voluntary Action. Chicago. November 16, 2006.

“Are the $41 Trillion Wealth Transfer Estimates Still on Track?. With John J. Havens. Presentation to the 2007 annual meeting of the Association for Research on Nonprofit Organizations and Voluntary Action. Atlanta. November 16, 2007.

“Receiving and Giving as Spiritual Exercise: The Spirituality of Care in Soul, Relationship, and Community.” Annual Thomas H. Lake Lecture on Faith and Giving. Lake Institute on Faith and Giving. Indiana University. April 10, 2008. Indianapolis.

“Prosperity, Generosity and Care: Elements of a Business School Curriculum.”
Paper written for and presented at Conference on Teaching Generosity in Philanthropy in Business Schools and Organizations. Witherspoon Institute. Bendheim Center for Finance, Princeton University. Princeton, New Jersey. July 10, 2008. -

“Financial Resource Impacts on Time Allocation to Paid and Unpaid Work Over the Life Cycle.” With John J. Havens. Presentation to the 2008 annual meeting of the Association for Research on Nonprofit Organizations and Voluntary Action. Philadelphia. November 21, 2008.

“High Net Worth Households that Make Very High Charitable Gifts: Findings on Three Under-Studied Concepts.” With John J. Havens. Presentation to the 2009 annual meeting of the Association for Research on Nonprofit Organizations and Voluntary Action. Cleveland. November 6, 2009.

"The Transition to Wealth and the Building of a Giving Culture in Korea." Keynote address presented at Beautiful Foundation's 10th Anniversary Giving Korea National Research Conference on Wealth and the Culture of Giving. Korea Chamber of Commerce and Industry. Seoul, Korea. October 22, 2010.

"The Patterns, Meaning, and Motivations of Formal Philanthropy and Personal Care." University Lecture Presented at Yonsei University. Seoul Korea. October 25, 2010.

"The Societal Aspects of Philanthropy and the Spiritual Foundation of Philia." University Lecture Presented at SookMyung Women's University. Seoul Korea. October 25, 2010.

"Methods and Metrics of the Center on Wealth and Philanthropy's Individual Giving Model." With John Havens. Presentation to the Giving Institute's 2010 Gurin Forum. New York City. November 12, 2010.

"High Net Worth Households that Make Very High Charitable Gifts: Findings on Three Under-Studied Concepts." With John J. Havens. Presentation to the 2010 annual meeting of the Association for Research on Nonprofit Organizations and Voluntary Action. Alexandria, Virginia. November 19, 2010.

Invited Papers and Presentations:

"Class Segments and the Structure of Unemployment." Presented at the conference sponsored by the National Science Foundation, "Labor Markets and Socio-Economic Stratification," University of Georgia, Athens, Georgia, March 1980.

Invited by American Sociological Association to organize and preside at session, "The Sociology of Unemployment," Toronto. August 1981.

"Developments in Workplace Control and Class Structure." Presented to graduate students and faculty, Cornell University, Ithaca, New York. March 24, 1982.

"Labor Market Theory and Modes of Unemployment." Address to Inter-University Study Group on Unemployment, Boston College, Chestnut Hill, Massachusetts, April 1982.

"Conceptualizing the Labor Market and Structural Unemployment." Presented to conference on The Changing World of Work and the Implications for Employment-Related Education and Training, sponsored by the State of Illinois Department of Adult, Vocational, and Technical Education at the Illinois Institute of Technology, Chicago, June 23-24, 1983.

"The Transition to Socialism and the Transformation of the Church." Future of Religion Conference, Dubrovnik, Yugoslavia, April 1984.

"Unemployment as a Transition Status." North American Labor History Conference, Wayne State University, Detroit, October 18-20, 1984.

"Labor Market Structure and Unemployment." Seminar on Labor Markets, Harvard University, Cambridge, Massachusetts, November 1984.

The Catholic Bishops' Pastoral Letter on the Economy." Brandeis University Catholic Chaplaincy, Waltham, Massachusetts, November 1984.

"Theological Perspectives on the Catholic Bishops' Letter on the Economy." Department of Economics, Wellesley College, Wellesley, Massachusetts, April 1985.

"Downward Mobility and the Theory of the Reserve Army." Presentation to Seminar on Perspectives on Labor Markets, MIT/Harvard, Cambridge, Massachusetts, November 1985.

"Directions for Social Science Research on Philanthropy." Independent Sector Academic Retreat, Washington, D.C., June 1987.

"The Analysis of Wealth and Philanthropy." Presentation to Seminar on American Philanthropy, Tufts University, Boston, November 1987.

"Bringing Recipients Back In: Philanthropy as a Social Relation." Independent Sector Academic Retreat, Indiana University, Indianapolis, June 7-8, 1988.

"Giving and Getting: Philanthropy as a Social Relation." With Susan Ostrander. Inaugural Symposium at the Center on Philanthropy, Indiana University, Indianapolis, June 8-9, 1988.

"Wealth and the Spirituality of Money." Detroit Chapter of *Legatus* (Organization of Catholic Presidents and Chief Executive Officers), Ann Arbor, Michigan, September 29, 1988.

"Strategies the Wealthy Pursue in their Giving." National Committee on Planned Giving Annual Conference, Indianapolis, November 1, 1988.

"Principality and Individuality among the Wealthy." Department of Sociology Colloquium, Indiana University, Indianapolis, November 2, 1988.

"The Modern Medici: World-Building and Self-Construction Among the Wealthy." Department of Sociology Colloquium, Harvard University, Cambridge, Massachusetts, November 17, 1988.

"Strategies of Life, Strategies of Philanthropy, Strategies of Research." Research Colloquium presented to the Philanthropic Initiative, Inc., Boston, October 25, 1990.

“The Ties that Bind: The Inner Nexus of Wealth, Religion, and Philanthropy.” Program on Non-Profit Organizations, Yale University, New Haven, Connecticut, November 27, 1990.

“Charity and Identity: The Organic Ethics of Philanthropy.” Presentation to CASE/Dartmouth Institute for the Study of Applied and Professional Ethics Task Force on the Study of Ethics of Institutional Advancement in Higher Education, Babson College, Wellesley, Massachusetts, May 3, 1991.

“Philanthropy among the Wealthy: Empowerment, Motivation, and Strategy.” Presentation to Rocky Mountain Philanthropic Institute, Vail, Colorado, July 22, 1991.

“The Dependent Variable of the Independent Sector: A Research Agenda for Improving the Definition and Measurement of Giving and Volunteering.” Presented at the Conference on Charitable Statistics sponsored by the New York University School of Law Program on Philanthropy and the Law, Indiana University Center on Philanthropy, Duke University Center for the Study of Philanthropy and Voluntarism, Washington, D.C., May 8, 1992.

“Critical and Contemporary Issues in Wealth and Philanthropy.” Presentation to Rocky Mountain Philanthropic Institute, Vail, Colorado, July 19, 1992.

“Giving Strategies of the Wealthy.” Presentation to Rocky Mountain Philanthropic Institute, Vail, Colorado, July 20, 1992.

“Philanthropy: Serving Others or Self-Serving?” Presentation to Rocky Mountain Philanthropic Institute, Vail, Colorado, July 21, 1992.

“An Agenda for Research on Philanthropy.” Presentation to the Centro Mexicano Para La Filantropia, Universidad Iberoamericana, Mexico City, November 10, 1992.

“Giving Patterns of the Rich and Poor.” Presentation to Doctoral Fellows, Indiana University Center on Philanthropy, San Antonio, March 16, 1993.

“Contemporary Gospels of Wealth: Narratives of Power and Responsibility.” University Lecture, Indiana University, Indianapolis, April 2, 1993.

“Moral Biographies of the Wealthy: Issues of Interpretation and Some Findings.” Presentation to Faculty Seminar on Wealth, Indiana University, Indianapolis, April 2, 1993.

“Identity and Identification: Understanding What Motivates Philanthropy.” Presented to the National Conference of Bar Foundations, Kansas City, Missouri, February 5, 1994.

“The Strategy of Charity: Implications of Research for Development Efforts.” Presentation to the Commonwealth Society [Metropolitan Boston Development Officers], Boston, May 5, 1994.

“Identity, Strategy, and Mobilization: Some Research Foundations for Fundraising.” Presented to the International Conference of the National Society of Fund Raising Executives, Boston, March 9, 1994.

“Income, Wealth, and Patterns of Giving.” Presented at Taking Fund Raising Seriously: Cultures of Giving, 7th Annual Symposium, the Indiana University Center on Philanthropy, Indianapolis, August 13, 1994.

“Mobilizing the Philanthropic Impulses of the Wealthy.” Presentation at Discovering Information Strategies for the New World, annual conference of the American Prospect Research Association, Cambridge, Massachusetts, August 18, 1994.

“The Contradictions of Christmas: The Elementary Forms of the Spiritual Life.” Presented to the annual meeting of the Catholic Commission on Intellectual and Cultural Affairs, Cambridge, Massachusetts, October 28, 1994.

“Teach the Children Well: Transferring Financial Care to the Next Generation.” Keynote address to the Northwest Development Officers Association, Tacoma, Washington, November 15, 1994.

“Financial Philanthropy: Its Meaning and Transmission.” Presentation to the American Technion Society, Wellesley, Massachusetts, December 8, 1994.

“The Philosophical, Moral, and Strategic Foundations of Philanthropy.” Presentation to Jefferson Legacy Foundation, Sarasota, Florida, January 3, 1995.

“Strategies of Philanthropy: Managerial, Investment, and Entrepreneurial.” Paper presented to Social Capital and Community Development Conference, Baruch College, School of Public Affairs, New York, May 11, 1995.

“Inclination, Obligation, and Association: What We Know and What We Need to Learn about Donor Motivation.” Paper presented to the Think Tank on Fund-Raising Research sponsored by the National Society of Fund Raising Executives, the Council for Advancement and Support of Education, and the Association for Research on Nonprofit Organizations and Voluntary Action at the Indiana University Center on Philanthropy, Indianapolis, June 2, 1995.

“Association, Social Agenda, and Social Capital: Recruitment to Philanthropy.” Presentation to Community Foundation Membership of the Associated Grantmakers of Massachusetts, Boston, September 13, 1995.

“The Spiritual Horizon of Wealth.” Presentation at the Loyola Colloquium, University of Connecticut Catholic Center, Storrs, Connecticut, September 20, 1995.

“The Dynamics of the $10 Trillion Wealth Transfer.” Presentation to the Massachusetts Chapter of the National Society of Fund Raising Executives, Boston, March 20, 1996.

"Strategies of Philanthropy: How The Rich Donate Their Wealth." Keynote address to the joint conference of the Nebraska Society for Fundraising Executives and the Planned Giving Officers of Nebraska, Doane College, Crete, Nebraska, August 13, 1996.

"Economic Discipleship in the Lives of the Wealthy." Presentation to the joint conference of the Nebraska Society for Fundraising Executives and the Planned Giving Officers of Nebraska, Doane College, Crete, Nebraska, August 14, 1996.

"The Heart of the Matter: The Spiritual Dimensions of Wealth and Philanthropy." Seminar presented to the Think Tank on Planned Giving, Chicago, October 9, 1996.

"The Spiritual Horizons of the Technical Dimensions of Financial Planning." Keynote address to the Renaissance National Conference on Social Capital, Haines City, Florida, January 30, 1997.

Luncheon Roundtable, Facilitator. Association for Research on Non Profit Organizations and Voluntary Action, New York, November 7, 1996.

Chair and Discussant for the section on "The Religious Matrix of America's Nonprofits." Association for Research on Non Profit Organizations and Voluntary Action, New York, November 7, 1996.

"Vocations of Caritas: The Spiritual Meaning, Strategic Practice, and Fundraising Mission of Philanthropy." Opening plenary address to the Annual Meeting of the Council for the Advancement and Support of Education (CASE), Boston, February 1, 1997.

Moderator, Endowing Values session, Family Foundation Conference, New York, February 10, 1997.

"Values Clarification and the Family Financial Philosophy." Opening keynote address at the Legacy Institute Training for Professional Advisors, "Creating the Family Financial Philosophy," Legacy Advisory Associates, Inc., Chicago, April 19, 1997.

"Wealth and the Spiritual Secret of Money." Two-day seminar presented to Kellogg Fellows, sponsored by the W. K. Kellogg Foundation, Chicago, June 25-26, 1997.

"The Moral Biographies of the Wealthy: How to Understand, Uncover, and Utilize Them in Charting a Financial Legacy." Lunch address to the Legacy Institute Training for Professional Advisors, Legacy Advisory Associates, Inc., Waltham, Massachusetts, June 27, 1997.

"How to Understand, Uncover, and Utilize the Moral Biographies of the Wealthy in Charting a Financial Legacy." Plenary address to the Legacy Institute Training for Professional Advisors, Legacy Advisory Associates, Inc., Chicago, July 30, 1997.

"Surfacing and Analyzing the Moral Biographies of the Wealthy." Legacy Institute Estate Planning Seminar, New Orleans, September 21, 1997.

“The Servants: Donors as Agents of Empowerment and Morality.” Presented to the Planned Giving Council of Eastern Wisconsin, Milwaukee Athletic Club, Milwaukee, September 26, 1997.

“The Servants of the Servants: Professional Counselors in the Service of Caritas.” Presented to the Planned Giving Council of Eastern Wisconsin, Milwaukee Athletic Club, Milwaukee, September 26, 1997.

“Uncovering and Understanding the Financial Care of the Wealthy.” Legacy Institute Estate Planning Seminar, Los Angeles, October 30, 1997.

“The Autobiographies of Living and Giving among the Wealthy.” Teleconference Seminar for Post-Graduate Students in the Professional Mentoring Program of the National Association of Family Wealth Counselors, December 18, 1997.

“Analyzing the Moral Biographies of the Wealthy.” Legacy Institute Estate Planning Seminar, Dallas, February 7, 1998.

“How to Interview Wealth Holders about Their Financial Vocation.” Presentation to the National Alliance of Renaissance Associates (Trust Officers and Estate Planners), Dallas, February 9, 1998.

“Charting a Financial Legacy.” Presentation to American Express Financial Advisors, San Antonio, March 6, 1998.

“Empowerment and Gospels of Wealth.” Presentation to New York Life Insurance Advisors, Weston, Massachusetts, March 21, 1998.

“New Findings on the Physical Density of Charitable Giving and Implications for the Moral Density of Care.” Educational Seminar for the Board of Directors of the American Association of Fund-Raising Counsel (AAFRC) and the Board of Trustees of the AAFRC Trust for Philanthropy, Princeton Club, New York, March 23, 1998.

“The Spiritual Foundations of Caritas and the Empirical Dynamics of Philanthropy.” Keynote address to the New England Association of Health Professionals, Newport, Rhode Island, April 19, 1998.

“Who Are Your Donors? How Do They Think?” Panel presentation to the New England Association of Health Professionals, Newport, Rhode Island, April 19, 1998.

“Wealth Holders, Charitable Givers.” Legacy Institute Estate Planning Seminar, Chicago, August 3, 1998.

“The Material and Spiritual Inclinations of Wealth Holders Toward Charitable Giving.” Teleconference Seminar for Post-Graduate Students in the Professional Mentoring Program of the National Association of Family Wealth Counselors, August 8, 1998.

"Major Donors, Major Motives: The People and Purposes Behind Major Gifts." Presentation to the 25th Annual Conference of the International Association for Financial Planning, Salt Lake City, October 4, 1998.

"Better Than Gold: Bringing Wealth Into the Service of Wisdom." Plenary presentation to the National Association of Family Wealth Counselors, Breckenridge, Colorado, May 12, 1998.

"Learning and Understanding the Million Motives of Millionaires." Legacy Institute Estate Planning Seminar, Atlanta, October 7, 1998.

"Interviewing the Affluent: Unpacking Philanthropic Values and Motivation." With Scott C. Fithian. Presentation to the 1998 National Conference on Planned Giving, Atlanta, October 9, 1998.

"Advancing Our Understanding of Major Donors: A Discussion of New Research Findings on Charitable Giving." Educational Seminar for the Senior Executive Training Track, 18th Annual New Jersey Conference on Philanthropy, New Jersey Chapter of the National Society of Fundraising Executives, Newark, New Jersey, November 5, 1998.

"Exploring and Interpreting the Moral Biographies of Wealth." Legacy Institute Estate Planning Seminar, Chicago, November 14, 1998.

"Measurement and Motivation: Current Knowledge on the Empirical Trends and Moral Impetus for Charitable Giving." Presentation to the Friday Forum of Development Officers and Consultants of Greater Boston, Harvard Club, Boston, November 20, 1998.

"Attitudes, Interests, and Motives of Wealth Donors and Prospective Donors: Lessons from the Latest Research." Presentation to the Strategic Thinking Conference: Positioning Community Foundations in Light of Changes in the Financial Services Industry and Attitudes of the Very Wealthy, sponsored by the Community Foundations Strategic Alliance, Chicago, January 14, 1999.

"The Future of Philanthropy." Panel presentation and discussion at plenary session of the Council for Advancement and Support of Education and the National Association of Independent Schools national conference, Chicago, January 30, 1999.

"Individual Donor Motivations in Philanthropy." Presentation to the Spring 1999 Seminar Series: Framing the Nonprofit Sector's Challenges, the Hauser Center for Nonprofit Organizations, the Kennedy School of Government, Harvard University, Cambridge, Massachusetts, March 11, 1999.

"Topics and Techniques for Interviewing Wealth Holders." Legacy Forum Seminar, Chicago, April 6, 1999.

"Uncovering and Interpreting the Moral Biographies of Wealth." Legacy Forum Seminar, Los Angeles, May 19, 1999.

"Millionaires and the Millennium: What Animates the Forthcoming Upsurge in Charitable Giving." Seminar presentation to the Trustees and Board of Directors of the Pittsburgh Community Foundation, Pittsburgh, June 17, 1999.

"Trends in Charitable Giving by Wealth Holders." Legacy Forum Seminar, Chicago, June 22, 1999.

"The Material and Spiritual Horizons of Philanthropy." Luncheon address to the 1999 Council for Advancement and Support of Education (CASE) International Assembly, Boston, July 19, 1999.

"Material and Spiritual Horizons of Wealth and Philanthropy." Teleconference Seminar for Post-Graduate Students in the Professional Mentoring Program of the National Association of Family Wealth Counselors, September 21, 1999.

"The Material and Spiritual Horizons of Charitable Giving by Wealth Holders." Two-session executive seminar to the Indiana Fundraising Day Conference sponsored by Indiana Gives and the Indiana Chapter of the National Society of Fundraising Executives, Indianapolis, September 24, 1999.

"Strategies of Charitable Giving as Modes of Engagement." Legacy Forum Seminar, Chicago, September 27, 1999.

"Tomorrow's Donor: How Do High-Net-Worth Families Think about Their Wealth and Charitable Giving?" Presentation to the Joint Meeting of the Council on Foundations and the Strategic Alliance of Community Foundations, Denver, September 29, 1999.

"A Research Agenda for the Field of Family Philanthropy." Presentation to the Board of Directors of the National Center for Family Philanthropy, Duke University, Durham, North Carolina, October 7, 1999.

"Trends in Charitable Giving." Presentation for plenary panel, "The State of American Civil Society and Its Philanthropic Tradition," 1999 Annual Meeting of the Philanthropy Roundtable, Naples, Florida, October 28, 1999.

"A Research Agenda for Advancing Philanthropy." Presentation to the Giving New England Advisory Board, Boston, November 23, 1999.

"Charitable Giving: Material Trends and Motivational Approaches." Lecture presented to Indiana philanthropy executives, the Indiana University Center on Philanthropy, Indianapolis, December 9, 1999.

"The Forthcoming Golden Age of Philanthropy." Dinner speaker at the 1999 Grenzebach Glier & Associates Client Conference, Chicago, December 10, 1999.

"Spiritual Reflections on Material Decisions." Presentation to the Hispanic Stewardship Development Partnership, Indianapolis, February 18, 2000.

"The New Foundations of Community Foundations: Material Trends and Moral Meanings." Presentation to the Kansas City Community Foundation, Kansas City, Missouri, February 22, 2000.

"Four Horizons of the Golden Age of Philanthropy." Three-session seminar presented to the Oklahoma Planned Giving Council, Stillwater, Oklahoma, February 23, 2000.

"Care and Discernment: The New Physics of Philanthropy." Presentation to the California Community Foundation, Los Angeles, February 24, 2000.

"Wealth and Philanthropy: Motivations and Trends." Keynote address to the Ninth Annual Spring Conference for Indiana Community Foundations, Indianapolis, April 26, 2000.

"The New Terrain of Wealth and Philanthropy: Recognizing and Engaging the Inclinations of Donors." Presentation to the Renaissance National Conference on Social Capital, Indianapolis, April 27, 2000.

"The Material and Spiritual Motivations of Wealth and Philanthropy." Keynote address to the Ascension Health Council of Foundations, 26th Annual Conference, Indianapolis, May 22, 2000.

"Sharing the Wealth: How Philanthropy—and Much of American Society—Will be Revolutionized by the '$100 Trillion Wealth Transfer.'" Opening address, Sharing the Wealth: Charitable Giving in Prosperous Times, summit produced by Minnesota Public Radio's Sound Money and Civic Journalism Initiative, St. Paul, Minnesota, September 8, 2000.

"Prospects for a Golden Age of Philanthropy." Keynote address to the Family Foundation Forum, Houston, October 18, 2000.

"Charitable Giving: Its Practice and Meaning." Seminar presented to Schwab Insight 2000 forum, Washington, D.C., October 28, 2000.

"The New Physics of Philanthropy." Two-session training program presented to the annual Fall Seminar of the Stark Community Foundation, Canton, Ohio, November 7, 2000.

"Supply and Demand: Honoring Donor Intent While Serving Community Needs." Presentation to the Board of Directors and Staff of the United Way of Central Indiana, Indianapolis, November 29, 2000.

"New Direction in Charitable Giving: The Emerging Material and Spiritual Horizons." Keynote address to the 34th Annual Conference of the Council for Research Development, Washington, D.C., December 2, 2000.

"The New Physics of Philanthropy." Four-session training seminar presented to the LDS Foundation, Provo, Utah, February 16, 2001.

“New Frameworks and Findings in Philanthropy: Recent Research Directions and Their Implications for Fundraising.” Four-session presentation to the Girl Scout 2001 Seminar for Senior Professionals, Edith Macy Conference Center, Briarcliff Manor, Westchester County, New York, February 28, 2001.

“Millionaires and the Millennium: Material Horizons” and “Millionaires and the Millennium: Spiritual Horizons.” Seminar and lunch presentations to the Middle Tennessee Planned Giving Council and the Association of Fundraising Professionals, Nashville Chapter, Nashville, March 6, 2001.

“Four Horizons of a Golden Age of Philanthropy.” Seminar presented to the Western Michigan Planned Giving Group, Grand Valley State University, Grand Rapids, Michigan, March 9, 2001.

“Wise as Serpents and Gentle as Doves: The Material and Spiritual Horizons of Philanthropy.” Seminar presented to the Conference on Funding Future Ministry at the Episcopal Church Foundation’s Annual Conference on Planned Giving, Pasadena, California, March 10, 2001.

“The Supply Side and the Supply of Philanthropy.” Presentation for Opening General Session Panel, the Commonfund Forum of foundation and endowment officers, Orlando, March 10, 2001.

“The Golden Age of Philanthropy—Estimates of the Forthcoming Wealth Transfer and Its Impact on the Nonprofit Sector.” Keynote address to the Donors Forum of the Wisconsin Annual Statewide Conference on Philanthropy, Milwaukee, April 3, 2001.

“Four Horizons of a Golden Age of Philanthropy.” Keynote address to the Resource Group Annual Meeting (Lincoln Financial Advisers), Las Vegas, May 4, 2001.

“Philanthropy’s Supply Side: New Findings, Frameworks, and Implications for Fundraising.” Presentation to the ABA-Jackson Hole Law School Development Conference, Jackson Lake Lodge, Grand Teton National Park, Wyoming, May 30, 2001.

“The Horizons of Philanthropy: Material, Spiritual, Methodological, Vocational, and Strategic.” Presentation to the National Association of Planned Giving Chicago Study Group, Chicago, July 14-15, 2001.

“The Material, Spiritual, Methodological, Vocational, and Strategic Horizons of Philanthropy.” Presentation to the Community Foundation of the National Capitol Region, Washington, D.C., July 17, 2001.

“The Emerging Material and Spiritual Horizons of Philanthropy.” Two-day seminar presented to the Campbell & Company 25th Anniversary Summer Staff Meeting, Galena, Illinois, August 2-3, 2001.

"New Horizons, New Research Agenda." Keynote address to the 14th Annual International Conference of the Association of Professional Researchers for Advancement, Chicago, August 17, 2001.

"Donor Inclinations as Allies: The Favorable Conditions for Marketing Instead of Selling Philanthropy." Opening plenary address to the 2001 New York Nonprofit Conference of the Direct Marketing Association Nonprofit Federation, New York City, August 28, 2001.

"The Horizons of Philanthropy: Material, Spiritual, Methodological, Vocational, and Strategic." Plenary address to the Annual Meeting of the Ivy, Stanford, MIT Development Officers, New York, September 11, 2001.

"Why Donors Give: Motivations & Trends." Conference keynote and plenary workshop presented to Leave a Legacy–Arizona, Tucson, Arizona, October 2, 2001.

"New Horizons of Philanthropy: Meaning, Money and Motives." Keynote plenary presented to the International Fundraising Congress, Noordwikerhout, Amsterdam, October 16, 2001.

"Learning About Your Donors: Research Strategies that Work." Workshop presented to the International Fundraising Congress, Noordwikerhout, Amsterdam, October 17, 2001.

"The New Terrain of Enlightened Self-Love: The Intensification of Care in an Era of Crisis." Presented to Senior Professional Associates of the Indiana University Center on Philanthropy, Indianapolis, October 26, 2001.

"A Fresh Understanding of the Patterns, Prospects and Motivations of Philanthropy." Seminar workshop presented to Leave a Legacy—Iowa, Des Moines, November 7, 2001.

"From Scarcity to Abundance—New Foundations for Fundraising Leadership." Lunch address to Leave a Legacy—Iowa, Des Moines, November 7, 2001.

"The Horizons of Philanthropy: Material, Spiritual, Methodological, and Vocational." Seminar workshop presented to the Association of Fundraising Professionals Mid-America Chapter, Kansas City, Missouri, November 14, 2001.

"The Foundations of Philanthropy in the Spiritual Infrastructure of Care." Presentation to the American Association of Fundraising Counsel, New York, November 16, 2001.

"Gospels of Wealth: How the Rich Portray Their Lives." Seminar presented to the Greater Cincinnati Planned Giving Counsel Winter Seminar, Cincinnati, January 24, 2002.

"The Material and Spiritual Inclinations of Philanthropy." Seminar presented to the Greater Cincinnati Planned Giving Counsel Winter Seminar, Cincinnati, January 24, 2002.

"New Thinking on Wealth & Philanthropy." Seminar presented to the Greater Denver Donors Association, Denver, March 1, 2002.

“The New Physics of Fundraising.” Seminar presented to Greater Denver fundraising and development professionals, Denver, March 1, 2002.

“Ignatian Identity: The Value of Leading with Your Leading Value.” Consultation for the Weston Jesuit School of Theology, Cambridge, Massachusetts, March 7, 2002.

“The Material and Spiritual Horizons of Philanthropy.” Plenary address to the North American Conference on Christian Philanthropy, Nashville, Tennessee, April 5, 2002.

“The Spiritual Secret of Wealth and Philanthropy.” Workshop given to the North American Conference on Christian Philanthropy, Nashville, Tennessee, April 5, 2002.

“The New Physics of Philanthropy.” Seminar presented to Philanthropy Partners Colloquium, Boston, April 25, 2002.

“Better Than Gold: The Spirituality and Ministry of Philanthropy.” Presentation to the Annual Development Meeting for the Jesuit Provinces, Framingham, Massachusetts, April 26, 2002.

“The New Physics of Philanthropy: The Money, Meaning, and Motives.” Presentation to State Street Global Advisors, Boston, April 29, 2002.

“Social Capital as Financial Care.” Keynote address to the National Association of Philanthropic Planners, Cincinnati, May 3, 2002.

“Collaborative Philanthropy.” With Scott Fithian. Presentation to the National Association of Philanthropic Planners, Cincinnati, May 3, 2002.

“New Trends in the Money, Meaning, and Motives of Philanthropy.” Keynote address to the Planned Giving Group of New England, Boston, May 8, 2002.

“Cultivating a Culture of Compassion.” Seminar presentation to the United Way of New York State Conference 2002, Albany, New York, May 14, 2002.

“New Trends in Philanthropy: The Money, The Meaning and the Motives.” Seminars presented for Wealth Strategies Consultants, LLC, Plymouth, Massachusetts, Northampton, Massachusetts, and Hartford, Connecticut, May 21, 2001.

“New Possibilities for Collaborative Philanthropy: Donors, Charities, and Beneficiaries.” Plenary address on behalf of the New Hampshire Humanities Council, St. Anselm College, Manchester, New Hampshire, May 23, 2002.

“New Horizons of Wealth and Philanthropy: The Money, Meaning, Motives, and Methods.” Keynote address to the 2002 Senior Staff Retreat, Johns Hopkins Development and Alumni Relations, Gettysburg, Pennsylvania, June 18, 2002.

“The New Physics of Philanthropy: Material and Spiritual Sides of the Supply Side.” Keynote address to the Alumni Affairs and Development All-Staff Conference, Harvard University, Cambridge, Massachusetts, June 19, 2002.

“Better than Gold: The Money, Meaning, Motives, and Methods of Wise Philanthropy for a Religious University.” Presentation to development officers of Madonna University, Livonia, Michigan, July 15, 2002.

“Importance of Research to a Growing Field: What Do We Need to Know?” Presentation to the Board of Governors of the Indiana University Center on Philanthropy, Battle Creek, Michigan, July 17, 2002.

“Heirs, Philanthropy and Uncle Sam—Will Estate Tax Law Changes Affect Estate Plans’ Allocation Patterns?” Presentation to the 23rd Annual Estate Planning and Fiduciary Law Program, North Carolina Foundation Bar Association Continuing Legal Education, Kiawah Island, South Carolina, July 20, 2002.

“New Horizons of Philanthropy: Money, Meaning and Motives—What They Mean to Estate Planners.” Plenary address to the 23rd Annual Estate Planning and Fiduciary Law Program, North Carolina Foundation Bar Association Continuing Legal Education, Kiawah Island, South Carolina, July 20, 2002.

“Philanthropy’s Future: Trends, Innovations, and Forecasts.” Panel presentation to CommonWealth5, WCVB-TV’s “Philanthropy’s New Frontier: From Institutional to the Internet,” Needham, Massachusetts, September 24, 2002.

“New Horizons of Philanthropy: The Money, Meaning, Motivations, and Methods.” Address to Women in Development of Greater Boston, Tremont Hotel, Boston, September 25, 2002.

“Funding and Fundraising as a Spiritual Exercise: Ignatian Spirituality and the Foundations of Philanthropy.” Workshop presented to the development staffs of the Apostolates of the Detroit Province of the Society of Jesus, Toledo, Ohio. November 12, 2003.

“The Dynamics of Self-Reflective Philanthropy.” Presentation to the Boards of Trustees of the American Association of American Fundraising Counsel and of the American Association of Fundraising Counsel Trust for Philanthropy, Chicago, December 6, 2002.

“The New Physics of Philanthropy.” Seminar presented to the CASE Seminar on Advancement Leadership for Presidents, Harvard University, January 13, 2003.

“Better than Gold: The Inner Life of Charitable Giving.” Presentation to the Donors Group of the Grantmakers of Western Pennsylvania, Pittsburgh, January 28, 2003.

“Capacity, Care, and Choice: New Horizons in Philanthropy and Fundraising.” Workshop presented to the South Carolina Planned Giving Council, James Island, South Carolina, February 7, 2003.

"Visions of Sugarplums: The Material and Spiritual Horizons of Philanthropy." Keynote address to the Association of Lutheran Development Executives 2003 Conference, Irvine, California, March 1, 2003.

"The Inner Dynamics by Which Wealth Leads to Financial Care." Presentation to the Association of Lutheran Development Executives 2003 Conference, Irvine, California, March 1, 2003.

"Three Classes of Souls and the Soul of Financial Care: Discerning a Personal Gospel of Wealth and Philanthropy." Presentation to the Association of Lutheran Development Executives 2003 Conference, Irvine, California, March 1, 2003.

"Wealth Transfer in an Age of Affluence." Plenary panel presentation to the More than Money National Members' Conference, Cambridge, Massachusetts, May 2, 2003.

"The Social-Psychology of the Supply Side of Philanthropy." Presentation to Seattle area nonprofit researchers and professionals, Seattle, Washington, May 7, 2003.

"Planning the New Planned Giving: The Money, Meaning, Motives, and Methods." Plenary address to the Washington Planned Giving Council, Seattle, Washington, May 8, 2003.

"The Material, Spiritual, and Methodological Horizons of Philanthropy." Address to Charity and Financial Professionals sponsored by Bank of America, Seattle, Washington, May 8, 2003.

"New Directions in Planned Giving." Keynote address to the Regional Conference of Financial Planning Association of Georgia, Atlanta, May 22, 2003.

"The New Physics of Philanthropy: The Money, Meaning, Motives, and Methods." Keynote address to the American Bar Association Jackson Hole VII: Conference on Law School Development for Deans and Administrators, Jackson Hole, Wyoming, May 27, 2003.

"New Directions in Philanthropy." Plenary panel at the American Bar Association Jackson Hole VII: Conference on Law School Development for Deans and Administrators, Jackson Hole, Wyoming, May 28, 2003.

"The New Physics of Philanthropy: The Money, Meaning, Motives, and Methods." Presentation to nonprofit executives and financial professionals, The Calgary Foundation, Calgary, Alberta, May 30, 2003.

"Donors and Fundraisers: Their New Horizons of Philanthropy." Presentation to Calgary Foundation Officers, Board Members, and Donors, The Calgary Foundation, Calgary, Alberta, May 30, 2003.

"Agent Animated Philanthropy." Keynote address to the Social Venture Partners International Conference, Calgary, Alberta, May 30, 2003.

"Discernment and Discerned Giving: New Directions for an Ignatian Approach to the Money, Meaning, Motives, and Methods of Fundraising." Presentation to the Jesuit Advancement Administrators Conference, Georgetown University, June 23, 2003.

"Wisdom and Moral Biography: New Directions for Jewish Fundraising." Keynote presentation to Jewish Federation Executives, Fisher-Bernstein Institute, Brandeis University, June 30, 2003.

"New Directions for an Ignatian Approach to the Money, Meaning, Motives, and Methods of Fundraising." Presentation and workshop to the University Advancement Conference of Marquette University, Milwaukee, Wisconsin, September 4, 2003.

"Moral Biography and Philanthropy." Presentation to the Combined Jewish Philanthropies, Westin, Massachusetts, September 7, 2003.

"The New Horizons of Philanthropy: The Money, Meaning, Motives, and Methods. Two-day retreat presented to the Moravian Ministries Foundation in America, Hershey, Pennsylvania, September 19-20, 2003.

The New Horizons of Philanthropy: The Intersection of Abundance and Care." A four-part workshop presented to the University of Philanthropy, Leave a Legacy of Southeast Pennsylvania, Harrisburg, Pennsylvania, September 25, 2003.

"Discernment and Discerned Philanthropy." Plenary address to the National Catholic Development Conference, Los Angeles, September 30, 2003.

"The New Physics of Philanthropy: The Material and Spiritual Horizons of the Money, Meaning, Motives, and Methods." Three-part workshop presented to the National Catholic Development Conference, Los Angeles, September 30, 2003.

"The Moral Biography of Wealth: The Intersection of Capacity and Character." Presentation to the Merrill Lynch Attorney Advisory Board, New York, October 23, 2003.

"The New Horizons of Financial Planning." Plenary address to the New England Financial 2003 Masters Marketing Institute, Boston, November 4, 2003.

"How Giving Shapes Donors and Their Community." Keynote address to the Association of Fundraising Professionals, Florida First Chapter, Eighteenth Annual Philanthropy Day Awards Luncheon, Jacksonville, Florida, November 20, 2003.

"Spiritual Agency: The Moral Biography of Capacity and Character." One-day training seminar presented to the LDS Foundation, Salt Lake City, Utah, February 11, 2004.

"The Spiritual Gateway of the Money, Meaning, and Motives of Philanthropy." Workshop presented to the North American Conference of Christian Philanthropy, St. Louis, April 30, 2004.

"The New Ministry of Financial Discernment." Plenary address to the North American Conference of Christian Philanthropy. St. Louis. April 30, 2004.

"A New Way for the United Way: Shaping the Philanthropic Culture of the Community." Workshop presented to the United Way of New York State Multi-State Conference 2004, Albany, May 6, 2004.

"A New Community for the Community Foundation." Keynote address to the Community Foundations of Canada 2004 National Conference, Quebec City, May 14, 2004.

"Donor Stewardship: Donor Services and Managing Your Donor." A two-session panel presentation and discussion at the Community Foundations of Canada 2004 National Conference, Quebec City, May 14, 2004.

"The Money, Meaning, Motives, and Methods of the Horizons of Philanthropy." Workshop presented to Tiger-21 (The Investment Group for Enhanced Results, 21st Century), New York, July 21, 2004.

"The Discovery and Self-Discovery of a Moral Biography of Wealth." All-day workshop presented to financial planners in the Legacy Coach Network, Chicago, September 15, 2004.

"The Way for the United Way to Understand Donors and Itself." Presentation to staff and community volunteers of the United Way of Winnipeg, Winnipeg, September 21, 2004.

"The New Physics of Philanthropy." Plenary address to the Canadian Association of Gift Planners, Winnipeg, September 22, 2004.

"Philanthropy and Fundraising: The Supply and Demand of Philanthropy in the Early 21st Century." Plenary presentation to the Continuing Education in Fundraising Conference, Concord, New Hampshire, October 15, 2004.

"The Emerging Long Wave of Philanthropy: Financial Security and Strategic Friendship." Keynote address to the Smith-Barney Center on Philanthropy Conference, October 19, 2004.

"The Moral Biography of Wealth and Philanthropy." Presentation and discussion on the intergenerational transfer of wealth, the Metropolitan Association for Philanthropy, St. Louis, October 20, 2004.

"The State of Estates: The Inner Nexus of Financial Security and Philanthropy." Presentation to financial advisors and fundraisers, Leave a Legacy St. Louis, St. Louis, October 21, 2004.

“Planning for the New Planned Giving: The Rising Tide of Biographical Philanthropy.” Address to fundraisers sponsored by the St. Louis Planned Giving Council, St. Louis, October 21, 2004.

“The New Physics of Philanthropy: The Personal Side of Wealth and Giving.” Plenary address to the Wealth & Giving Forum, The Greenbrier, White Sulphur Springs, West Virginia, October 22, 2004.

“The Moral Biography of Wealth in the Early 21st Century: New Directions in the Money, Meaning, Motives, and Methods of Philanthropy.” Plenary address to the Microedge Solutions Conference, Boston, October 25, 2004.

“Private Wealth Today: The Demographics, Attitudes, and Market Shares of High-Net-Worth America.” Address to the Georgetown University Law Center Continuing Legal Education Conference, Washington, D.C., October 28, 2004.

“The Patterns and Prospects of Wealth and Philanthropy: The Money and the Meaning.” Keynote address to the Smith Barney 2004 Consulting Group Graduate School, Denver, Colorado, November 11, 2004.

“The New Physics of Philanthropy: The Personal Side of Wealth and Giving.” Plenary address to the Wealth & Giving Forum, The Greenbrier, White Sulphur Springs, West Virginia, April 15, 2005.

“The Meaning and Motives of Wealth and Philanthropy.” Main platform presentation to the 2005 Annual Conference of Advanced Life Underwriters, Ottawa, Canada, May 3, 2005.

“Conversations that Animate Philanthropy.” Workshop presentation to the 2005 Annual Conference of Advanced Life Underwriters. Ottawa, Canada. May 3, 2005.

“The Money and Motives For Providing Daily Bread On the Other Side of the Word.” Panel presentation and discussion at After the Tsunami: Philanthropy in the Global Era, Sponsored by the Boston Foundation and the American Red Cross of Massachusetts Bay, Boston, May 17, 2005.

“The New Physics of Philanthropy.” Keynote address to Greater Lowell Community Foundation Ninth Annual Philanthropy Day, Lowell, Massachusetts, June 1, 2005.

“The Next Generation of Philanthropists: The Money, Meaning, and Motives.” Keynote address to the CASE Assembly, Miami, July 17, 2005.

“The New Generation of Philanthropists and the New Methods of Financial Advisement and Fundraising.” Keynote address to the Rhode Island Committee on Planned Giving, Providence, September 22, 2005.

"New Methods of Financial Advisement and Fundraising: Instituting a Practice of Discernment and Discerned Decision-Making." Workshop presented to the Rhode Island Committee on Planned Giving, Providence, September 22, 2005.

"The Art and Science of Giving." Presentation to ENVISION: Innovations in Health Care Philanthropy, The Cleveland Clinic, Cleveland, September 23, 2005.

"The New Physics of Philanthropy and the New Physics of Advisement: Financial Advisement as a Biographical Event." Plenary address and workshop presented to the Burlington Community Foundation Professional Advisor's Forum, Burlington, Ontario, October 6, 2005.

"Research on Wealth and Philanthropy: The Confluence of Methods and Theory." Presentation at Indiana University Center on Philanthropy, Indianapolis, October 10, 2005.

"The Personal Side of Giving." Plenary address to the Wealth &Giving Forum. White Sulphur Springs, West Virginia. October 21, 2005.

"The Moral Biography of Wealth: The Cultural Horizon and Spiritual Prospect of Wealth and Philanthropy in the Early 21st Century." Plenary address to Special Olympics Canada, Toronto, October 12, 2005.

"The New Physics of Philanthropy: The Personal Side of Wealth and Giving." Plenary address to the Wealth & Giving Forum, The Greenbrier, White Sulphur Springs, West Virginia, October 22, 2005.

"The New Art of Giving and the Arts: Wealth Transfer and the Emerging Generation of Funders and Fundraisers. Workshop presented to the Arts & Business Council of Rhode Island. Providence, Rhode Island. October 25, 2005.

"Geography and Generosity: Boston and Beyond." Presentation of Findings to the Boston Foundation Forum, Understanding Boston. November 8, 2005.

"How Can Your Charity Tap Into the $41 Trillion Wealth Transfer?" Presentation to clients of Chevy Chase Bank & Chevy Chase Trust. Chevy Chase Bank. Bethesda, Maryland. November 8, 2005.

"The Moral Biography of Wealth, Wealth Transfer, and Client Discernment: Financial Advisement as a Biographical Event. Workshop presented to The Nautilus Group. Dallas. November 10, 2005.

"How the Intergenerational Transfer of Wealth: Will Affect the Southeastern Region." Plenary Address to the 36th Southeastern Council of Foundations Annual Meeting. Marco Island, Florida. November 11, 2005.

"The North Dakota Wealth Transfer Study: Context and Implication." Presentation to the Impact Foundation. Fargo, North Dakota. January 20, 2006.

“The New Horizons of Philanthropy.” Presentation and Discussion sponsored by Philanthropy Northwest, The Seattle Foundation, Social Venture Partners, and Washington Women’s Foundation. Seattle. February 15, 2006.

“The New Physics of Philanthropy and the New Physics of Financial Advisement” Address to the Estate Planning Council of Seattle. Seattle. February 15, 2006.

“The New Physics of Philanthropy: The Money, Meaning, Motives, and Methods” Presentation to law school class. Harvard Law School. Cambridge. February 17, 2006

“The Horizons of Wealth, Philanthropy and Fundraising.” Distinguished Speakers Address presented to Association of Fundraising Professionals International Conference. Atlanta. April 3, 2006

“The New Physics of Philanthropy and the New Physics of Educational Fundraising.” Keynote address to the National School Foundation Association. Chicago. April 6, 2006.

The Horizons of Philanthropy in a Fertile Land. Address to the Ireland Funds' seventh annual seminar on Promoting Philanthropy in Ireland. Dublin. April 19, 2006.

“Financial Advisement as a Biographical Event.” Distinguished lecturer workshop to the Advisors in Philanthropy. Chicago. April 28, 2006.

“Trends in Philanthropy.” Presentation at opening panel, “The Supply and Demand Sides of Philanthropy Today.” United Jewish Communities, Development Professionals Institute. Cambridge, Mass. May 7, 2006.

“The New Physics of Philanthropy and the New Physics of Fundraising.” Presentation to a joint meeting of the Kansas City Chapter of the Association of Fundraising Professionals and the Mid-America Planned Giving Council at Rockhurst University. Kansas City, Missouri. May 18, 2006.

“The Moral Biography of Care: Material Capacity and Spiritual Aspiration in the Service of Care.” Training Session with Rockhurst University fundraising staff. Kansas City, Missouri. May 18, 2006.

“Discernment and Discerned Philanthropy: Wealth as a Tool of Wisdom.” Lecture to donor advisors with CLE credits. Kansas City, Missouri. May 18, 2006.

“The Gift of Ignatian Discernment and Rockhurst’s Prospects for Gifts.” Workshop presented to combined Kansas City & St. Louis Planned Giving Committee meeting, with selected volunteers and University staff. Kansas City, Missouri. May 19, 2006.

“Daily Bread: Charitable Giving as a Spiritual Practice.” Luncheon address to the Rockhurst University Heritage Society. Kansas City, Missouri. May 19, 2006.

“Liberty and Inspiration: An Ignatian Approach to Charitable Decision-Making.” An interactive session with selected alumni and friends of Rockhurst University. Kansas City, Missouri. May 19, 2006.

“A Baker’s Dozen of Trends in Philanthropy.” Luncheon Address to executive directors of sponsoring organizations and guests of The Fourteenth Annual Estate Planning Symposium. New Orleans. May 23, 2006.

“The Next Generation of Philanthropists: The Money, Meaning, and Motives.” Workshop presented to The Fourteenth Annual Estate Planning Symposium. New Orleans. May 23, 2006.

“Today’s Wealth Holders and the Spiritual Horizon of Philanthropy. Luncheon address to the Annual Meeting of the Community Foundation of Sarasota County. Sarasota. May 24, 2006.

“The New Methods of Fundraising.” Workshop presented to the nonprofit community of Sarasota County. Sarasota. May 25, 2006.

“The New Physics of Philanthropy and the New Physics of Financial Advisement. “ Workshop presented at the Financial Forum 2006: The Great Wealth Transfer. Oakbrook Terrace, Illinois. June 6, 2006.

“The New Horizons of Supply and Demand in Philanthropy: The Prospects and Challenges. “ Dinner address to the Providence College Board of Trustees. Providence, Rhode Island. June 8, 2006.

“The New Horizons of Philanthropy and Fundraising: The Money, Meaning, Motives, and Methods.” Workshop presented to The Jewish Federation of Palm Beach County. Palm Beach, Florida. Wednesday, June 21, 2006.

“Preparing for the New Horizons of Philanthropy, Financial Planning, and Fundraising: The Money, Meaning, Motives, and Methods.” Workshop presented to The Impact Foundation. Fargo, North Dakota. Thursday, June 22, 2006.

“The Vocation of Philia: Discerning a Moral Biography of Friendship and Happiness.” Presentation to the Church of the Epiphany, South Haven, Michigan, youth pilgrims. Boston College, July 26, 2006.

“The Moral Biography of Philanthropy and Family.” Presentation to the Family Firm Institute New England chapter Quarterly Meeting. Boston. September 7, 2006. .

“Today’s Wealth Holder and Tomorrow’s Giving: The New Dynamics of Wealth and Philanthropy.” Philanthropy at Work Seminar. Milwaukee. September 13, 2006.

“What the Transfer of Wealth Means for Wisconsin: Creating a Moral Biography of Philanthropy.” Presentation to Seventh Annual Statewide Conference on Philanthropy Donors Forum of Wisconsin. Milwaukee. September 13, 2006.

“Horizons of Research on Philanthropy.” Nonprofit Research Colloquium. Helen Fader Institute for Nonprofit Management. University of Wisconsin, Milwaukee. September 13, 2006.

“Creating a Moral Biography of Wealth and Philanthropy.” Dinner address. 10th Anniversary Client Celebration. Back Bay Financial Group. Boston. September 14, 2006.

“Major and Principal Gifts: Capitalizing on the Intergenerational Transfer of Wealth and the Golden Age of Philanthropy.” Presentation to Ivy Plus Conference. Boston. September 18, 2006.

"A Golden Age of Philanthropy? The Impact of the Great Wealth Transfer.” With John J. Havens. Presentation at the Council on Foundations Fall Conference for Community Foundations. Boston. September 18, 2006.

“The Washington Region’s $720 Billion Golden Age of Philanthropy.” Presentation to the Chevy Chase Trust conference on the Washington D. C. Metropolitan Area’s wealth transfer. Chevy Chase, Maryland. October 5, 2006.

“How Much is Enough?: Dilemmas and Strategies for Transferring Wealth to Children.” Presentation to wealth holders sponsored by the Jewish Federation of Los Angeles. Los Angeles. October 17, 2006.

“The Art of Fundraising and the Arts.” Presentation to the Greater Boston Chorus Consortium. Boston. October 19, 2006.

“Wealth, Philanthropy, and Financial Advisement: A Guide for the 21st Century.” Workshop sponsored by Main Street Community Foundation and the Community Foundation of Greater New Britain. New Britain, Connecticut. November 6, 2006.

“Clarifying Donor Aspirations for Charitable Giving: A Guide for the 21st Century.” Workshop sponsored by Main Street Community Foundation and the Community Foundation of Greater New Britain. New Britain, Connecticut. November 7, 2006.

“The New Philanthropists and the New Philanthropy.” Presentation on the panel Philanthropy Now. United Jewish Communities General Assembly. Los Angeles. November 12, 2006.

“The New Physics of Philanthropy and Fundraising: The Money, Meaning, Motives, and Methods.” Plenary workshop for National Philanthropy Day sponsored by the Association of Fundraising Professionals of Central Virginia. Richmond. November 14, 2006.

“Key Issues Facing today’s Foundations & Endowments.” Panelist on Smith Barney’s Consulting Group Philanthropy Roundtable. Boston. January 23, 2007.

"Moral Biography, the Patterns of Giving, and the Meaning of Philanthropy." All day workshop presented to the Orchard Foundation of the Christian and Missionary Alliance Church. Colorado Springs. January 30, 2007.

"The Motives and Spiritual Discernment of Philanthropy." One-day workshop presented to the Orchard Foundation of the Christian and Missionary Alliance Church. Colorado Springs. January 31, 2007.

"Reaching Potential Donors and Making a Successful Connection." Workshop presented to the West Coast Chabad-Lubavitch. Glendale, California. February 19, 2007.

"How Much Is Enough? The Craft of Wise Wealth Allocation to Heirs: A Program for Professional Advisors." Luncheon Address. Family Foundation Center of the Jewish Community Foundation of Los Angeles. Los Angeles. March 7, 2007

"The New Physics of Philanthropy: Money, Meaning and Motives." Workshop presented to the Jewish Funders Network. Atlanta. March 20, 2007.

"Your Philanthropy: Aspirations, Effectiveness, and Significance: Where You Have You Come From in Your Philanthropy, Where Are You Today, and Where Would You Like To Be In the Future?" Workshop presented to the Jewish Funders Network. Atlanta. March 20, 2007.

"The Soul of Financial Advisors and Advisement: The Sense and Sensibility of Philanthropy." Plenary workshop presented to Advisors in Philanthropy Conference on Philanthropy. Rosemont, Illinois. April 28, 2007

"The New Physics of Wealth and Philanthropy: Economics, Social Psychology, and Spirituality. Presentation to students and faculty at Stonehill College. Easton, Massachusetts. March 28, 2007.

"From Inspiration to Implementation." Presentation to Winchester Hospital Advancement Staff and Donors. Winchester, Massachusetts. April 4. 2006/

"The current Status of Philanthropy in Ireland." Presentation to nonprofit leaders. Boston College—Dublin. Dublin, Ireland. April 11, 2007.

"The Moral Biography of Wealth and the New Physics of Philanthropy." Seminar Presented at the Boston College Irish Institute Ten-Year Alumni Reunion and Conference. Dublin, Ireland. April 13, 2007.

"Deepening the Relationship Between donors and NonProfit Organizations through Biographical Conversations." Seminar Presented at the Boston College Irish Institute Ten-Year Alumni Reunion and Conference. Dublin, Ireland. April 14, 2007.

"The Soul of Financial Advisors and Advisement: The Sense and Sensibility of Philanthropy." Keynote address to Advisors in Philanthropy, Conference on Philanthropy. Rosemont, Illinois. April 28, 2007.

"The New Physics of Philanthropy: The Patterns, Meaning, Motives, and Conversations." Presentation to Council on Jewish Philanthropy. New York. April 29, 2007.

"The New Physics of Philanthropy and Fundraising: The Money, Meaning, Motives, and Methods." Workshop presented to The Cleveland Clinic Campaign Executive Board Annual Meeting. Walden Country Inn & Stables, Aurora, Ohio. May 11, 2007.

"The New Horizons of Wealth and Philanthropy." Presentation to clients, Savant Capital Management, Inc. Northern Illinois University, Rockford, Illinois. May 17, 2007.

"The New Physics of Philanthropy and the New Physics of Advisement: Carrying out Biographical Conversations with Your Clients. Workshop presented to advisors of Savant Capital Management. Rockford, Illinois. May 18, 2007.

"The New Physics of Philanthropy." Presentation to Conference on Contemporary Issues in Wealth and Philanthropy for Today's Grant Makers, Fundraisers and Non-Profit Financial Officers. Boston College. Chestnut Hill, Massachusetts. May 23, 2007.

"The Golden Age of Philanthropy Is Here: Is Your Nonprofit Organization Taking Full Advantage of This Opportunity?" Workshop presented to New Hampshire Center for Nonprofits, Southern NH University, CONFR, the Heritage United Way, and the United Ways of NH. Southern New Hampshire University. Hooksett, New Hampshire. May 24, 2007.

"The New Physics of Philanthropy and the New Physics of Fundraising." Luncheon Keynote address to the Mid-America Fundraising & Nonprofit Leadership Conference. Fargo, North Dakota. June 4, 2007.

"Deepening Relationships with Your Donors Through Biographical Conversations." Workshop presented at the Mid-America Fundraising & Nonprofit Leadership Conference. Fargo, North Dakota. June 4, 2007.

"The New Physics and Spirituality of Philanthropy and A New Ministry of Fundraising." Three day seminar presented to the National Catholic Development Conference Leadership Summit: Understanding the Heart of the Donor. DePaul University Chicago. June 13-15, 2007

"The New Physics of Philanthropy and the New Physics of Fundraising: Moral Biography, Money, Meaning, Motives, and Method." Engineering Development Forum. University of Virginia. June 20, 2006.

"Understanding the Philanthropic Potential of Lifetime Giving and the Coming Wealth Transfer in the Washington, DC Region." Presentation to the Board of Directors of The Community Foundation for the National Capital Region. Washington, D.C. June 28, 2007.

“The New Physics of Philanthropy and the New Physics of Fundraising:
Moral Biography, Money, Meaning, Motives, and Method.” Day-long seminar presented to the 2007 American Technion Society Summer Staff Institute. White Plains, New York. July 17, 2007.

“The New Physics of Philanthropy: Money, Meaning and Motives.” Plenary presentation at the Wachovia Nonprofit and Philanthropic Services 2007 Nonprofit Leader Summit. New York City, September 5, 2007.

“Liberty and Inspiration: An Ignatian Approach to Charitable Decision-Making.” Workshop presented to Major Gift Benefactors and Prospects. Rockhurst University. Kansas City, Missouri. September 12, 2007.

“Finding God in All Things: Daily Work as the Way to the Divine Presence.” Presentation to the staff of Rockhurst University. Kansas City, Missouri. September 12, 2007.

“The Spirituality of Living and Giving Aristotle and Ignatius Loyola on Ultimate Ends, Daily Care, Finances, and Discernment.” Visiting Scholar Lecture Series. Rockhurst University. Kansas City, Missouri. September 12, 2007.

“Carrying out a Biographical Interview: What Is It? And What Can It Do for Your Donors…and You?” Workshop presented to Wright State University development staff. Wright State University. Dayton, Ohio. September 27, 2007.

“The New Physics of Philanthropy and the New Physics of Fundraising.’ Seminar presented to The Planned Giving Council of Greater Dayton. Wright State University. Dayton Ohio. September 27, 2007.

“The Money, Meaning, and Motives of Philanthropy and Their Foundation in *Philia*.” Address presented to friends of the Baton Rouge Area Community Foundation. Baton Rouge. October 17, 2007.

“America's Looming Philanthropic Revolution: Moral Biography, Money, Meaning, Motives, and Method.” Plenary address presented to the GenSpring Family Symposium. Philadelphia. October 30, 2007

“The Intersection of Philanthropy & Spirituality.” Breakout session for the GenSpring Family Symposium. Philadelphia. October 30, 2007

“The New Physics of Philanthropy.” Closing Keynote Address: for the Wachovia 2007 Planned Giving Summit, November in Charlotte, North Carolina, November 8, 2007.

“Gender Differences in Financial Resources and Charitable Giving with a Focus on High Net Worth Widows.” With research assistance by John J. Havens. Panelist, Plenary Panel on “Do We Really Know the Facts about Gender and Philanthropy?” United Jewish Communities General Assembly. Nashville, Tennessee. November 11, 2007.

“The Material and Spiritual Horizon of Today’s Wealth Holder: The Professional Advisor’s Deeper Role in Their Clients’ Philanthropic Life.” Keynote speaker for Impact Foundation Seminar for Professional Advisors: “ Is Philanthropy the Answer?” Fargo, North Dakota. November 28, 2007.

“The Soul of Fundraising: The Sense and Sensibility of Philanthropy.” Presentation to Irish and Northern Irish non-profit managers and business executives. U. S. State Department Program on Philanthropy and Corporate Social Responsibility. Boston College Irish Institute. January 24, 2008.

“Moral Biography of Wealth and Philanthropy: How To Surface and Analyze the Moral Biographies of Wealth Holders.” Workshop presented to InKnow*Vision*. Chicago. February 2, 2008.

“Leaving a Legacy of Care: The New Philanthropist” Address to Principle Centered Leadership and Ignatian Conversations for Business Executives of the New England Province of the Society of Jesus. Boston. February 5, 2008.

“What Motivates Giving?” Presentation at A Dialogue on Philanthropy Symposium. Sponsored by Thomas C. Foley, U. S. Ambassador to Ireland. Phoenix Park Residence. Dublin. February 21, 2008.

“The Great Wealth Transfer.” Plenary Address to annual meeting of World Financial Group. Los Angeles. March 8, 2008.

“From Wealth to Capacity and From Philanthropy to Philia: The Deeper Spiritual Currents of Financial Life and Financial Counsel.” General session keynote address to the 2008 Conference on Philanthropy of the International Association of Advisors in Philanthropy. Chicago. April 25, 2008.

“The Moral Biography of Care: Material Capacity and Spiritual Aspiration” Keynote Address to the National Jesuit Advancement Conference. Boston. April 30, 2008.

“Future Trends in Philanthropy: The Intergenerational Transfer of Wealth, Values and Leadership.” Panel Presentation at Bessemer Trust’s Conference on the Future of Philanthropy. New York City. May 1, 2008.

“The Material and Spiritual Horizons of Today’s Wealth Holder: The Financial Ministry to Your Donors' Philanthropic Biography.” Workshop presented at the Summit on the Mount Conference of the Moravian Ministries Foundation in America. Laurel Springs, North Carolina. May 2 & 3, 2008.

“The New Physics of Philanthropy: The Moral Biography, Money, and Meaning of Philanthropy.” Workshop presented to the Canadian Association of Gift Planners. Winnipeg. June 3, 2008.

“How Much is Enough Money for Heirs?—And How Much Is Too Much Philanthropy?”. Lunch Plenary address presented to the Canadian Association of Gift Planners. Winnipeg. June 3, 2008.

“Philanthropic Motives, Discernment, and Discerned Giving.” Workshop presented to the Canadian Association of Gift Planners. Winnipeg. June 3, 2008.

“Vision to Action: Innovations in Education Philanthropy for Longwood University.” Two-day workshop presented to Board of Directors, Volunteer Visitors, and the Campaign Committee. Longwood University. Farmville, Virginia. June 5-6. 2008.

“Estate Planning as a Biographical Event: Moral Biography, Money, Meaning, Motives, and Method.” Plenary Keynote Address to WealthCounsel's 11th Annual Estate Planning Conference. San Antonio. June 12-14, 2008.

“Today’s Donor: Deeper Knowledge for Higher Education. Keynote address to Blackbaud’s 2008 Higher Education Forum. Boston, June 19, 2008.

“Discerned Philanthropy: The Golden Nexus Between Donors’ Needs and Beneficiaries’ Needs.” Workshop presented to Blackbaud’s 2008 Higher Education Forum. Boston, June 19, 2008.

“The Material and Spiritual Horizons of Today’s Wealth Holder: A Deeper Role in Donors' Philanthropic Biography.” Workshop presented to United Jewish Appeal. New York City. July 23, 2008.

“Trends and the Meaning of Philanthropy.” Keynote address to 2008 Statewide Conference of the Association of Fundraising Professionals of Southern Arizona. Tucson. July 25, 2008.

“Sustaining the Financial and Moral Potential Of the Forthcoming Wealth Transfer.” Keynote address to the Benevon Sustainable Funding Conference. Orlando. July 26, 2008.

“The Financial Capacity and Moral Purpose of Today’s Wealth Holder:
A Deeper Role in Donors' Philanthropic Biography.” Workshop presented to the University of Pittsburgh development professionals. Pittsburgh. August 4, 2008.

“Family and Financial Morality.” Presentation to the Campden Family Office Conference. Boston. September 22, 2008.

“Trends on the Relationship of Wealth and Income, and Philanthropy.” Seminar presented at the Center for the Study of Wealth & Inequality. Columbia University. New York City. October 2, 2008.

“The Moral Biography of Wealth and the New Physics of Philanthropy: Meaning, Motives, Discernment, and Conversations.” Two-day workshop presented at the Conference on The Supply and Demand of Philanthropy in the 21st Century: Strategies for Fundraising and Financial Professionals. Sponsored by the International Association of Fundraising Professionals and the Center on Wealth and Philanthropy at Boston College. Boston. October 7-8, 2008.

“The Financial Capacity and Spiritual Purpose of Today’s Wealth Holder: A Deeper Role in Donors' Philanthropic Biography.” Workshop presented to Development Professionals of the Nativity/Miguel Network. Washington D.C. October 18, 2008

“Planned Giving as a Biographical Event.” Luncheon plenary address to the Minnesota Planned Giving Conference: The Journey to Giving. St. Paul, Minnesota. November 5, 2008.

“Discernment and Discerned Giving: How Donors Plan Their Gifts.” Workshop presented at the Minnesota Planned Giving Conference: The Journey to Giving. St. Paul, Minnesota. November 5, 2008.

“The 21st Century Donor: Emerging Trends in Giving.” Plenary address to Institute of Fundraising and Association of Fundraising Professionals: Global Perspectives on Major Donor Fundraising Conference. November 6, 2008. London, England.

“Recruiting and Developing Successful Major Donor Fundraisers.” Panel presentation. Institute of Fundraising and Association of Fundraising Professionals: Global Perspectives on Major Donor Fundraising Conference. November 6, 2008. London, England.

“Philanthropy's Happiness: Responding to Entreaty.” Address at the Campaign Finale Convocation. University of Michigan. Ann Arbor, Michigan. November 14, 2008

“Raising the bar in philanthropy.” Address to The UBS Philanthropy Roundtable, Building Change Communities: Getting Collaboration Right. New York City. November 19, 2008.

“Moral Biography, Meaning and Motives of Philanthropy as a Relationship of Care.” Workshop presented to the Canadian Association of Gift Planners.” Winnipeg, Manitoba. December 11, 2008.

“How Much Is Enough?” Luncheon address to the Canadian Association of Gift Planners.” Winnipeg, Manitoba. December 11, 2008.

“Implications for a New Approach to Fundraising and Financial Advisement; Instituting a Practice of Discernment and Discerned Decision Making.” Workshop presented to the Canadian Association of Gift Planners.” Winnipeg, Manitoba. December 11, 2008.

“The Ministry of Biographical Conversations.” Workshop presented to The Heart of the City Foundation. Orlando, Florida. January 12, 2009.

“The Moral Biography of Wealth and Philanthropy.” Address to community financial planners, fundraisers, and nonprofit leaders. Hosted by The Geneva School and The Rollins College Philanthropy and Nonprofit Leadership Center. Sponsored by The Edyth

Bush Charitable Foundation and The Seneff Family Foundation. Winter Park, Florida. January 12, 2009.

“Your Moral Biography of Wealth.” Presentation to client wealth holders of Cedar Street Advisors. Naples, Florida. February 19, 2009.

“The Royal Road To Gift Planning: The Meaning And Practice Of Biographical Interviews.” Workshop presented to the Planned Giving Council of Houston. Houston, Texas. April 23, 2009.

“Capacity And Care: The Moral Biography Of Wealth And Philanthropy.” Luncheon keynote address presented to the Planned Giving Council of Houston. Houston, Texas. April 23, 2009.

“Capacity And Care: The Moral Biography Of Wealth And Philanthropy.” Workshop Presented to the University of Ulster Arts & Business Program. Boston College Irish Institute. April 27, 2009.

‘Understanding the Philanthropic Biography of Donors: How to Make Giving More Emotionally Rewarding and Fulfilling.” Workshop Presented to the Fairfield Country Association of Fundraising Professionals. Stamford, Connecticut. May 7, 2009.

“Why People Give: The Spirituality and Psychology of Wealth and Philanthropy”. Presentation to donors and board members of Loyola High School. Los Angeles. May 12, 2009.

“Discernment as Client Service: The Meaning and Practice of Biographical Interviews.” Lunch Keynote with Continuing Education Credits for Financial Professionals.” Loyola High School. Los Angeles. May 12, 2009.

“Receiving & Giving as Spiritual Exercise: The spirituality of Care in Soul, Relationship and Community.” Address to Loyola High School Students. Loyola High School. Los Angeles. May 12, 2009.

“What Sustains Donors During the Current Climate? Answer: The Fundamental Meaning and Motives of Philanthropy.” Workshop presented to the Conference on Wealth and Giving in the Current Economic Climate. Sponsored by the International Association of Fundraising Professionals and the Boston College Center on Wealth and Philanthropy.” Boston. June 9, 2009.

The Royal Road To Philanthropy: The Meaning And Practice Of Biographical Interviews.” Workshop presented to the Conference on Wealth and Giving in the Current Economic Climate. Sponsored by the International Association of Fundraising Professionals and the Boston College Center on Wealth and Philanthropy.” Boston. June 10, 2009.

"Philanthropy as a Biographical Event: The Meaning, Motives, and Fundraising Methods That Fulfill Donors." Workshop presented to Dana Farber Development Retreat. Dana-Farber Cancer Institute. Boston. September 15, 2009.

"Financial Parenting: The Craft of Wise Wealth Allocation to Heirs-- PART I: Moral Biography and the Meaning and Motives of Philanthropy." Workshop Presented to Conference on Strengthening Families. Elon University. Greensboro, North Carolina. September 24 – 25, 2009.

"Financial Parenting: The Craft of Wise Wealth Allocation to Heirs-- Part II Family and Philanthropy." Workshop Presented to Conference on Strengthening Families. Elon University. Greensboro, North Carolina. September 25, 2009.

"Wealth and the Will of God." Dinner plenary address to the 33rd Presidents' Dinner for Philanthropy. Seventh Day Adventists International Assembly. Silver Spring, Maryland. November 8, 2009.

"How to Make Charitable Giving More Emotionally Rewarding and Fulfilling-- Moral Biography and the Meaning, Motives, and Biographical Methods of Philanthropy. Workshop Presented to The Family Systems Investment Consortium. Salem, Oregon. October 14, 2009.

"How to Make Charitable Giving More Emotionally Rewarding and Fulfilling-- The Money: Trends in Charitable Giving and Wealth Transfer." Workshop Presented to The Family Systems Investment Consortium. Salem, Oregon. October 14, 2009.

"The Wealth of Capacity, Inspiration, and Promise: Nurturing the Spiritual Biography of Our Donors." NativityMiguel Network. National Convention. Chicago Marriott O'Hare. October 16, 2009.

"Philanthropy as a Biographical Event: The Meaning, Motives, and Fundraising Methods That Fulfill Donors." Workshop presented to Archdiocesan Catholic Advancement Professional Development Day. Archdiocesan Pastoral Center. Braintree, Massachusetts. November 5, 2009.

"The Moral Biography of Wealth: The Material Prospect of Wealth and the Spiritual Prospect of Philanthropy." Workshop presented to The Eastern Iowa Planned Giving Council. African American Heritage Museum. Cedar Rapids, Iowa. November 18, 2009.

"The Road to Client Service: The Meaning and Practice of Biographical Interviews To Discover Clients' Goals and Values." Professional Education Workshop for Professional Advisors associated with the Catholic Community Foundation, Lutheran Community Foundation, and Minneapolis Jewish Federation. Minneapolis. June 24, 2010.

"Nurturing a Spiritual Biography of Our Donors." Professional Education Workshop for Staff of the Catholic Community Foundation, Lutheran Community Foundation, and Minneapolis Jewish Federation. Minneapolis. June 24, 2010.

"A Blueprint for Generosity." Plenary address to the National Leadership Roundtable on Church Management. Wharton School. Philadelphia. June 25, 2010.

"The Moral Biography of Wealth and The Money, Meaning, and Motives of the New Physics of Philanthropy" Plenary Address to Northwestern Mutual Conference for Their Upper-Tier Financial Professionals. Milwaukee. September 15, 2010.

"A Spirituality for Philanthropy for Donors and Advancement Professionals." Keynote speaker, The Episcopal Office of Mission Funding Symposium on the Spirituality of Philanthropy. New York City. September 29, 2010.

"The Meaning and Money of Today's Philanthropists: Nurturing the Spiritual Biography of Our Donors." Presentation to the Association of Fundraising Professionals Massachusetts Chapter. Boston. December 3, 2010.

"The Money, Meaning and Motives of the New Physics of Philanthropy". Seminar Presented at the Boston College Irish Institute. Boston College. January 19, 2011.

"Capacity for Care: Today, Yesterday, and Tomorrow." Foundation Leadership Forum sponsored by the Association of Governing Boards of Universities and Colleges. Coconut Grove, Florida. January 24, 2011.

"Women and Philanthropy: Catalyzing Events." Miss Hall's Annual Philanthropic Roundtable Discussion, New York University's Kimmel Center, New York, New York, April 7, 2011.

"Spiritual Foundation of The Horizons of Wealth, Philanthropy, and Fundraising in the Early 21st Century." The Center for the Study of Philanthropy in Israel. Hebrew University. Jerusalem, Israel. May 4, 2011.

"Financial Capacity and Spiritual Purpose: The Money, Meaning and Motives of 21st Century Philanthropy." The Center for the Study of Philanthropy in Israel. Hebrew University. Jerusalem, Israel. May 5, 2011.

Presenter to the Annual Thomas H. Lake Lecture on Faith and Giving. Lake Institute on Faith and Giving at the Center on Philanthropy at Indiana University. Indianapolis. September 23, 2011.

"Preliminary Results, Rhode Island Wealth and Giving Studies; and Conversation about Other New Research Findings." Providence, Rhode Island. October 12, 2011.

"Capacity and Care: A Conversation with Dr. Paul G. Schervish on Wealth and Philanthropy," A Presentation to High Net Worth Clients of Heaton Smith Group, LLC. Marriott Copley Center, Boston. October 19, 2011.

"New Findings on Wealth and Philanthropy and the Ancient Wisdom that Gives Them Meaning." Minnesota Planned Giving Council. Minneapolis. November 1, 2011

"The Craft of Biographical Conversations and the Implications for Fundraising." Minnesota Planned Giving Council. Minneapolis. November 1, 2011
Minneapolis, MN. November 1, 2011

"Discerning the Need for Reflection on the Inner Lives of Wealth Holders." Impact Foundation. Fargo, ND. November 6, 2011.

"Endless Possibilities on the Prairie: Unleashing North Dakota's Great Potential." With John Havens. Impact Foundation. Fargo, ND. November 6, 2011.

"The Money, Meaning Motives, and Methods of Fundraising that Improve the Well-being of Fundraisers" Workshop and Interactive Discussion with invited development professionals from Stark County. Speaking on: "The New Horizon of Your Clients' Financial Capacity and Charitable Purpose."Stark Foundation. Canton, OH. November 15, 2011.

Community Lectures and Presentations:

"The Theology and Politics of *Laborem Exercens*." Address to the Religious Caucus of the Democratic Socialist Organizing Committee, Cambridge, Massachusetts, October 1981.

"Faith and Justice in John Paul II's Encyclical on Human Work." Address to the Archdiocese of Boston Planning Committee, Lexington, Massachusetts, November 1981.

Address to public rally at Boston Garden sponsored by "Solidarity with Solidarity," Boston, February 7, 1982.

"Poverty and Unemployment." Course on Work: What's It Worth? Social Justice Project of the Paulist Center Community, Boston, November 6, 1982.

"How the Workplace Works." Course on Work: What's It Worth? Social Justice Project of the Paulist Center Community, Boston, November 6, 1982.

"Relations of Domination in Work and at the Workplace." Archdiocese of Boston, Permanent Deaconate Program, Boston, February 10, 1983.

Taped television program with The Working Channel, project of the College Cable Channel, Detroit, October 19, 1984.

Taped interview with RKO Radio on Department of Labor report on displaced workers, Boston, November 1984.

Respondent to Rev. David Hollenbach, S.J.'s presentation on the Pastoral Letter on Catholic Social Teaching and the American Economy, Justice and Peace Commission, Archdiocese of Boston, St. John's Seminary, Brighton, Massachusetts, December 15, 1984.

"The Catholic Bishops and the Economy." Lecture presented to the Jamaica Plain Council of Churches, March 1985.

"Religious Spirituality and the American Economy." Address to the Mennonite Community of Boston, May 1985.

Panelist, Video Teleconference: The Economic Pastoral and Family Life, Chicago, June 1985.

"Innovations in Work Arrangements as Economic Justice." Presentation to the Archdiocese of Boston, Permanent Deaconate Program, St. John's Seminary, Brighton, Massachusetts, February 1986.

"You Know Neither the Day Nor the Hour." First Congregational Church of Waverley, Belmont, Massachusetts, January 28, 1990.

"The Heavens and the Holy Trinity." First Congregational Church of Waverley, Belmont, Massachusetts, August 20, 1990.

"The Consolation of Time." First Congregational Church of Waverley, Belmont, Massachusetts, February 3, 1991.

"The Christian God and Mystical Christians." Park Avenue Congregational Church, Arlington, Massachusetts, June 14, 1992.

"You Know Neither the Day Nor the Hour." Park Avenue Congregational Church, Arlington, Massachusetts, July 26, 1992.

"Where Your Treasure Is: The Spirituality of Money in Moral Biography." First Church of Christ in Marblehead, Massachusetts, November 22, 1992.

"The Symbolism of Holy Week and Easter." Three-week adult education seminar at Park Avenue Congregational Church, Arlington, Massachusetts, March 1994.

"The Mystery of Christmas as the Contemporary Birth of God." Adult education presentation at Park Avenue Congregational Church, Arlington, Massachusetts, December 1995.

"Holy Night, Holy Family." Park Avenue Congregational Church, Arlington, Massachusetts, December 31, 1995.

"*Mysterium Tremendum et Facinans*." Sermon for the Park Avenue Congregational Church, Arlington, Massachusetts, April 21, 1996.

“Consuming Christmas and the Consumerism of Christmas.” Presentation to “Retrieve the Sabbath” adult education class, Corpus Christi Catholic Church, Auburndale, Massachusetts, December 8, 1996.

“The Gospels of Christmas.” Sermon for the Park Avenue Congregational Church, Arlington, Massachusetts, December 29, 1996.

“Cultural Studies: The American Character and the New Leaving Certification History Syllabus.” Presentation to the Cork History Teachers Association, Cork, Ireland, January 25, 2001.

“The Heart of the Heart of Philanthropy: The Deeper Meaning of Philanthropy as a Way of Life.” Presentation to Grab the Torch Philanthropy Camp for High School Students. Boston. July 9, 2009.

“The Mutual Nourishment of *Phila*: The Foundation for a Vocation of Care.” Presentation to Grab the Torch Philanthropy Camp for High School Students. Pomfret, Connecticut. August 6. 2010.

“The Lives of the Super Wealthy.” On Point with Tom Ashbrook. Radio interview and broadcast on National Public Radio. March 30, 2011.

“Philia as Friendship Love: the Foundation of Philanthropy.” Skype presentation to Grab the Torch Philanthropy Camp for High School Students. Simsbury, Connecticut. August 5, 2011.

Invited Lectures and Presentations at Boston College:

“Marxist Theories of Class.” Lecture sponsored by Philosophy Caucus, April 1981.

“Women and the Economy.” Presentation in workshop sponsored by the University Association of Women, May 1981.

“Sociological Issues Behind the Recent Military Build Up.” Address to convocation sponsored by the University Committee Against Nuclear War, November 11, 1981.

“Ideological Foundations of the Cold War.” Lecture in University course on War and Peace, March 1982.

Presenter at panel discussion on John Paul II's “On Human Work.” Sponsored by the University Chaplaincy and Theology Department, April 15, 1982.

“Prospects for Socialism in the United States.” Haley House, April 21, 1982.

“The Bishops' Pastoral on the Economy.” Presentation in conjunction with panel sponsored by Boston College Chaplaincy, January 1985.

“New Thinking on a New American Economy.” Presentation at panel, Morality and the Marketplace, discussing final version of Catholic Bishops' Pastoral, “Economic Justice for All: Catholic Social Teaching and the U.S. Economy,” sponsored by University Chaplaincy, March 31, 1987.

“The Sacred in Sociology.” Presentation at panel, “The Sound of the Sacred: The Foundation of University Life,” sponsored by The Jesuit Institute, April 22, 1991.

“Problems and Prospects of the Contemporary Catholic Church.” Presentation to meeting of delegation of German bishops and laity, sponsored by President's Office, September 9, 1991.

“The Jesuit Institute: Research as a Religious Vocation.” Presentation at Parents Weekend seminar, October 12, 1991.

“One Path Through the Abortion Debate.” Presentation sponsored by the Student Programs and Activities Center and the Pro-Life Coalition, October 28, 1991.

“Discovery as a Vocation: Research and Teaching at a Jesuit University.” Explorations Seminar, Boston College Development Office, November 13, 1992.

“The Tasks of Discovery and Education: The T. B. Murphy Foundation and the Social Welfare Research Institute.” Presentation at Jesuit Institute Event in Honor of T. B. Murphy, Bapst Library, January 26, 1993.

“The Contradictions of Christmas: Interdisciplinary Research at Boston College.” Presentation to Boston College National Development Board, March 5, 1993.

“Troubles and Traditions of Christmas.” Presentation for Boston College Faculty and Staff Resource Center, December 2, 1993.

“The Election for Personal Conversion and Social Transformation.” Remarks in Honor of the Life and Work of Yitzhak Rabin at the Boston College Memorial Service, November 8, 1995.

“Ignatian Discernment and the Sociology of Christmas.” Jesuit Institute, Fall Lecture Series, November 29, 1995.

“Sociology as a Vocation: The Meaning and Practice of the Major at Boston College.” Presentation on behalf of the Boston College Admissions Office to prospective students and parents during Campus Open House Week, April 17, 1996.

"Forthcoming Issues and the Forthcoming Election." Presentation and discussion to Boston College students on behalf of Boston College Housing Office, September 12, 1996.

"Faculty Roundtable, Perspectives on Travel Literature." Sponsored and published by Boston College Office of International Programs. *International Letter* 4, no. 1 (September 1996).

"The Realms of Faculty Citizenship." Andover Faculty Weekend, November 8-9, 1997.

"New Paradigm for the Sociology of Religion." Presentation and discussion to Jesuit Institute Seminar on Alienation of Intellectuals from Religion Within American Culture, February 18, 1998.

"The Sociology of the Inner Life and the Inner Life of Sociology." Presentation to Detroit Area Boston College Alumni, Birmingham Country Club, Birmingham, Michigan, June 10, 1998.

"The Dilemmas and Strategies of Christmas." Presentation to the Boston College Clergy Alumni, Boston College Alumni Association, November 4, 1998.

"The Core of the Core Curriculum." Endicott Faculty Weekend, November 20-21, 1998.

"Sociology, Social Science, and Jesuit Education at Boston College." Presentation on behalf of the Boston College Admissions Office to prospective students and parents during Campus Open House Weekend, January 23, April 10, April 17, and April 24, 1999.

"Identification and Inclination: The Financial and Social-Psychological Dispositions of Wealth Holders that Motivate Charitable Contributions." Presentation to the staff of the Boston College Development Office, August 5, 1999.

"Finances and Philanthropy: The Material Conditions and Motivational Inclinations of Wealth and Philanthropy." Presentation to Development Committee of the Board of Trustees and Capital Campaign Executive Committee, May 4, 2000.

"Research as a Vocation." Presentation to Meeting of Administrators of Catholic Colleges and Universities, Boston College, July 11, 2001.

"The New Physics of Philanthropy: The Money, Meaning, and Motives." Presentation at The Boisi Center for Religion and American Public Life, Boston College, April 2, 2002.

"Planned Giving and Philanthropy's Future." Presentation to the Boston College Shaw Society Steering Committee, Boston College Club, May 17, 2002.

"Inclination, Invitation, and Inclination: New Directions in Philanthropy in the United States." Presentation to the Non-Profit Development Program, Irish Institute at Boston College, June 14, 2002.

“The Horizons of Philanthropy in an Environment of Affluence.” Presentation to the Non-Profit Development Program, Irish Institute at Boston College, May 13, 2003.

“The New Philanthropists.” Presentation to the Non-Profit Development Program, Irish Institute at Boston College, March 2, 2004.

“New Horizons of Philanthropy and Fundraising.” Presentation to the staff of the Boston College Development Office, October 12, 2004.

“The New Physics of Wealth and Philanthropy: Spiritual Life in an Age of Affluence” Presentation to Carroll School of Management Honors Program. October 18, 2005.

“The New Physics of Philanthropy: The Money, Meaning, Motives, and Methods.” Lecture to students in Social Welfare Policy course. Boston College Graduate School of Social Work. November 9. 2006.

“The Soul of Fundraising: The Sense and Sensibility of Philanthropy.” Presentation to Irish and Northern Irish non-profit managers and business executives. U. S. State Department Program on Philanthropy and Corporate Social Responsibility. Boston College Irish Institute. January 24, 2008.

“Wealth and Philanthropy: Patterns and Meanings.” Presentation to students in the College of Advancing Studies. January 26, 2008.

"Patterns, Meaning, and Motives of High Net Worth Philanthropists." Presentation to students in the Carroll School of Management. September 25, 2008.

“Philanthropy: Trends in Wealth and Charitable Giving.” Presentation to students in the College of Advancing Studies. February 9, 2009.

“The Moral Biography of Wealth and The New Physics of Philanthropy.” Presentation to students in the Carroll School of Management. October 1, 2009.

“Socialization and Social Construction in Head, Heart, and Hands: The Vocation of Sociology.” Presentation to Students and Parents at Admitted Eagle Day. Boston College Admissions Office. January 24, 2010.

“Why Is Labor Silent? Segmented Class Orders.” Presentation to students in the College of Advancing Studies. February 7, 2010.

“Philanthropy as Spiritual Exercise: Soul, Relationships, and Community.” Presentation at The Boisi Center for Religion and American Public Life, Boston College, February 24, 2010.

“The Money, Meaning and Motives of Philanthropy.” Presentation to students in the Carroll School of Management. September 30, 2010.

Meeting with Monsignor Beach, newly appointed Director of Development of the Baltimore, Maryland diocese, at the request of the Boston College Development Office. March 10, 2011.

"Conditions the Advanced and Obstructed Citizen Response during the Recession." Presentation to the "American Class Structure" students of Fr. Woods in the College of Advancing Studies at Boston College. February 2011.

Working Papers:

Center on Wealth and Philanthropy, Boston College

www.bc.edu/cwp

"In Verdant Pastures: The Centrality of Voluntary Association for the Prominence of Philanthropy."

"Making Money and Making a Self."

"The Dynamics of Wealth Transfer: Behavioral Implications of Tax Policy for the $10 Trillion Transfer." With Thomas B. Murphy.

"The Sense and Sensibility of Religion: Retrieving Spiritual Experience as an Authentic Sociological Variable."

"The Social Relations and Personal Spirituality that Motivate Charitable Giving: A Replication of the Schervish-Havens Identification Model." With John J. Havens and Platon E. Coutsoukis.

"The Modern Medici: Patterns, Motivations, and Giving Strategies of the Wealthy."

"New Findings on Wealth and Philanthropy." With John J. Havens.

Professional Service:

Book and Journal Referee

Allyn & Bacon Publishers
American Sociological Review
The CASE International Journal of Higher Education Advancement
Harper-Collins Publishers

Indiana University Press
Journal of Social Policy
Little Brown Publishers
McGraw Hill Publishers
Nonprofit and Voluntary Sector Quarterly
Nonprofit Management and Leadership Review
Prentice Hall Publishers
Research in Social Stratification and Mobility
Social Forces
Social Problems
Sociological Focus
Sociological Forum
Sociology of Education
Sociology of Work and Occupations
Theological Studies
United States- Israel Binational Science Foundation
Voluntas: International Journal of Voluntary and Non-Profit Organizations

<u>Grant Referee</u>

Aspen Institute Nonprofit Sector Research Fund
Bunting Institute, Radcliffe College
National Institute of Mental Health
Indiana University Center on Philanthropy, Dissertation Fellowships
Fetzer Institute Research Grants
Indiana University Center on Philanthropy, Faculty Research Grants

<u>Professional Boards, Committees, and Panels</u>

Editorial Board, *Research in Social Stratification and Mobility,* 1987-1994

Advisory Board, Jesuit Institute at Boston College, 1988-present, Executive Committee 1988-1993, 2003-present

Advisory Panel for Biennial Survey on Giving and Volunteering, Independent Sector, Washington, D.C., 1989-1999

Editorial Board, *Philanthropic Studies Index*, Center on Philanthropy, Indiana University, Indianapolis, 1990-1997

Nonprofit Academic Centers Council, 1991-present
Chair, 1992-1993

Advisory Committee, Centro Mexicano Para La Filantropia, Universidad Iberoamericana, 1992-1993

Program Committee, 1993 Annual Research Forum, Independent Sector

Committee Member, National Center for Charitable Statistics, Independent Sector, Washington, D. C., 1993-1996

Selection Committee for Outstanding Dissertation by the Association for Research on Nonprofit Organizations and Voluntary Action, 1993-1995

Selection Jury for National Society of Fundraising Executives Staley/Robeson/Ryan/St. Lawrence Research Prize, 1993-1996

Faculty Mentor, *Collegium* summer institute on religious identity and the intellectual life sponsored by The Lilly Endowment at St. John's University, Collegeville, Minnesota, June 3-11, 1994

Member, Indiana University Center on Philanthropy Discretionary Income Research Group, June 1995-1997

Doctoral Fellowships Advisory Committee, Center on Philanthropy, Indiana University, Indianapolis, 1990-1993; Advisory Panel Mentor 1994, 1995, 1996, 1999

Participant, Points of Light Foundation, Think Tank on Gallup Survey on Volunteering, September 26, 1995

Member, 1995 Independent Sector Annual Meeting Host Committee

Consultant, Indiana University Center on Philanthropy Project on Government and the Third Sector, New York, December 8, 1995

Member, Independent Sector Nonprofit Effectiveness Research Panel, Washington, D.C., 1995-1997

Advisory Council on Methodology, AAFRC Trust for Philanthropy, New York, 1995-2010

W. K. Kellogg Foundation, Evaluator of Strategic Initiative of the Association for Research on Nonprofit Organizations and Voluntary Action, March 1, 1995-April 30, 1998

Member, Research Advisory Panel, National Society for Fundraising Executives, 1996-2000

Advisory Committee, Philanthropic Giving Index, Indiana University Center on Philanthropy, 1997-2010

Advisory Committee, Signature Research Project, Indiana University Center on Philanthropy, 1999-2002

Board of Trustees, Forsyth Institute, Boston, 1999-2009
Member: Development Committee 2001-2005, External Affairs Committee 2005- 2009. Honorary Trustee 2009-present

Advisory Planning Committee, Indiana University Center on Philanthropy Annual Symposium, 1991, 2000, 2001, 2002, 2003

Advisory Committee, Indiana Gives Survey, Indiana University Center on Philanthropy, 1999-2002.

Board of Trustees, Giving USA Foundation (formerly American Association of Fundraising Counsel Trust), 2001-2010
    New Directions Task Force – *Giving USA,* 2001
    Committee on Trusteeship, 2002

Advisory Board, Pacem Productions documentary *Wealth and the American Character*, 2001-2002

Advisory Board, The Giving Back Fund, 2001-present

Editorial Board, *The CASE International Journal of Higher Education Advancement,* 2001-2003

Editorial Board, *The International Journal of Educational Advancement*, 2004-present

Editorial Board, Planned Giving Design Center, 2002-2005

Research Advisory Committee, Independent Sector, Washington, D.C., 1988-1992, 1997-1999, 2004.

Senior Advisor, The Wealth & Giving Forum, 2003-present

Senior Advisor, The Sir John Templeton Foundation Wealth Project, 2004-present

Editorial Board, *The Nonprofit and Voluntary Sector Quarterly*, 2005-present

Board of Directors, Morgan Stanley Smith Barney Global Impact Funding Trust, Inc. (Formerly, Smith Barney Charitable Trust, Inc.), June 2006-present.

Advisory Group and Grant Referee for Aspen Institute project, "Advancing Knowledge about Foundation Spend-Down." May 2007-2009.

Advisory Board, Chartered Advisor in Philanthropy (CAP), 2009-present.

Advisory Board, Grab the Torch Philanthropy Camp for High School Students, 2010-present.

Advisory Board, Building Family Legacies Through Philanthropy, Xavier University, Cincinnati, Ohio. 2011-present.

Academic Research Awards:

Honorable Mention, Alpha Sigma Nu, National Jesuit Honor Society, Book Competition, 1984 for *The Structural Determinants of Unemployment*, New York: Academic Press, 1983.

1995 Virginia A. Hodgkinson Prize awarded by the Research Committee of the Independent Sector "for best research paper or essay published in 1994 that provides new understanding of issues regarding philanthropy, voluntary action, nonprofit organization and management, fundraising, or civil society." Prize awarded for Paul G. Schervish, "The Sound of One Hand Clapping: The Case for and Against Anonymous Giving." *Voluntas: International Journal of Voluntary and Nonprofit Organizations* 5, no. 1 (April 1994): 1-26.

Honorable Mention: Outstanding article appearing in the *Nonprofit and Voluntary Sector Quarterly* in 1995. By the Association for Research on Nonprofit Organizations and Voluntary Action. For Paul G. Schervish and John J. Havens, "Do the Poor Pay More: Is the U-Shaped Curve Correct?" *Nonprofit and Voluntary Sector Quarterly* 24, no. 1 (Spring 1995): 79-90.

1998 Virginia A. Hodgkinson Prize awarded by the Research Committee of the Independent Sector "for best research book, paper or essay published in 1996 or 1997 that provides new understanding of issues regarding philanthropy, voluntary action, nonprofit organization and management, fundraising, or civil society." Prize awarded for Paul G. Schervish and John J. Havens, "Social Participation and Charitable Giving: A Multivariate Analysis." *Voluntas: International Journal of Voluntary and Nonprofit Organizations* 8, no. 3 (September 1997): 235-260.

1999 John Grenzebach Research Award for Outstanding Published Scholarship in the area of educational fundraising. Prize awarded by the American Association of Fund Raising Counsel (AAFRC) Trust for Philanthropy, the Council for Advancement and Support of Education (CASE), and Grenzebach, Glier and Associates, Inc., for Paul G. Schervish and John J. Havens, "Social Participation and Charitable Giving: A Multivariate Analysis." *Voluntas: International Journal of Voluntary and Nonprofit Organizations* 8, no. 3 (September 1997): 235-260.

Professional Recognition:

Selected to *The NonProfit Times* Power and Influence Top 50, Class of 2000: "people who have moved the [nonprofit] sector during their careers, as well as just during the past 12 months." Citation: "Schervish is a trailblazer in the areas of philanthropy study and the sociology of wealth. His diary studies of giving, conducted with sidekick John Havens, as well as his analysis of the forthcoming transfer of wealth are widely cited." August 2000.

Selected to *The NonProfit Times* Power and Influence Top 50, Class of 2001: "There are leaders who blaze trails while others, just as importantly, provide that stability and fertile ground from which the sector will continue to grow and flourish." Citation: "Few researchers have the human touch and insight of Schervish. Research is just numbers until he interprets it and then makes the keen insights available to practitioners." August 2001.

Selected to *The NonProfit Times* Power and Influence Top 50, Class of 2002: "annual compilation of movers, shakers and opinion makers." Citation: "Numbers are only figures until Paul Schervish puts them in context. His passion for donor behavioral research, with John Havens [also in the Top 50], have brought true insight into why people give." August 2002.

Selected to *The NonProfit Times* Power and Influence Top 50, Class of 2003: Citation: "Simply, he is Mr. Donor Behavior. His studies with sidekick John Havens are influential and years ahead in predicting what donors will do with their money." August 2003.

Selected to *The NonProfit Times* Power and Influence Top 50, Class of 2004: Citation: "There is nobody better at studying the forms, trends, and motives surrounding the meaning and practice of care and giving in this age of affluence. Remember, it's not about you. It's about the donor." August 2004.

Presented the Scott Fithian Leadership Award by the International Association of Advisors in Philanthropy. April 25, 2008. "The Fithian Leadership Award is presented annually to an individual with a distinguished career in service to the philanthropic community. Awardees are selected for their efforts to uphold the standards of excellence in ethics, service and charitable planning encouraged by the Association."