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GIANT, IMPORTANT DISCLAIMER: WE AREN'T GIVING LEGAL, TAX OR FINANCIAL ADVICE. PLEASE SEEK YOUR OWN COUNSEL FOR ANY DONATIONS. MANY OF THESE QUESTIONS ARE OPEN TO SOME INTERPRETATION, ARE GENERAL IN NATURE OR ARE UNIQUE TO A PARTICULAR JURISDICTION. ASSUME ALL ANSWERS ARE WRONG UNTIL YOU/YOUR DONOR CONFIRMS WITH HER/HIS ADVISOR.

Q & A from "Harnessing the Practical Power of Generative AI in Gift Planning: 2024 Updates and New Tools" <July 2024>

Is this eligible for CFRE credit?	Not sure - if it can be self-reported, should be fine, but if it had to be pre-approved, it is not (pre-approving CE for all the designations/licenses nationally and for the various states is beyond painful)
Thank you for archiving your presentations.	Glad it is helpful - here is the link for others (and finally migrated over to a YouTube platform so we can add hundreds more assuming we have the stamina) https://charitablesolutionsllc.com/webinars/
Any chance they can enlarge the page they are doing the demo on?	Yes, just like any zoom setting on a web page.
What are some of the data sources you are using for "Max?"	The content Max uses for the data set comes ONLY from the Gift Planner's Workstation. This is content authored primarily by Paul Caspersen & Bryan Clontz and other authors such as Dr. Russell James, and many others to come soon.

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Where does the data source live?	Within the Gift Planners workstation that Paul has built.
In the virtual assistant routine, can it be programed to ask something like, "Would you like to have our Planned Giving Officer, Eric Rice contact you to discuss your objectives more specifically?"	Yes, we've had several organizations ask us if we can include their content and personalize the bot specifically for their organization. We can discuss this.
For organizations that might integrate Max or Frank into their websites, are their reports/data that are available regarding usage, identity of those who have used it, etc., if the user doesn't use the "Copy" button?	Great question - I will have Paul answer which as well goes to the Ethics issue which we will cover shortly. Users of Max 1.0 will receive quarterly analytics for clicks but will not have access to the specific users. Instead of a landing page Max can live on on your pages and then you can use your own analytics to know who the specific users of Max are. The Organizations ROI for a tool like Max 1.0 is dependent on promoting the use of this tool in your e-newsletters and other communication. We provide your ideas and tools to promote the use of Max.
So, it requires the user/donor to use the copy feature to obtain all of the information on the org's side, correct? There is not a way we could pull that information up if someone forgets to hit copy?	The donor can use the copy button or a simple cut and paste. For privacy reasons no one other than the User has access to the responses from Max 1.0. Hopefully you would see that as a feature. Trust is everything.
This is fascinating - especially given the different knowledge levels that fundraisers/development staff have at single organizations. Sort of brings everyone onto the same level.	I think more for the better than the worse... but yes! Particularly the use of Frank, and the Workstation for that matter, can take an entry level Gift Planner and assist them in carrying advanced conversations.
Do you think these tools will be more appealing to promote to advisors or donors?	Not too sure yet, but I think donors just based on the numbers if embedded into an existing website

Bryan - Thank you for all you do for our field.	
What is the actual cost of the Gift Planner's Workstation?	$699/year per license
Will we receive a copy of the slides after the webinar?	We don't send out slides but do send out a link for this full webinar and then it is added to our free library that has more than 50 webinars now. Sending slides out seem easy but two things occurred: 1. Multiple times people took the slides either without attribution or worse, fully attributed it to us, but used it out of context as if we were endorsing certain programs. And second, if you want to have tons of fun, send out our slides to 700-1,000 people (our average monthly attendees) and then block of the next three days of your life with... "I didn't get it"... "Your domain is blacklisted; can you send it to my personal email"... "I can't download it because of the version or firewall", etc. I was spending longer dealing with all those questions that putting together and delivering the topic. So, the sending slides was immediately nixed.
Lightbulb moment: How glad are all of us who do CGAs that we have software to do the calculations for us now so we don't have to do them by hand? Definitely doesn't replace us, but makes us more productive.	Exactly - tools can make everything easier (or harder!) but you will be very surprised, perhaps even impressed, with what Paul has built. He will demo it in a few minutes.
How are nonprofits protected from being seen to offer financial/legal advice versus 'general information?	If you demo Max 1.0 you'll see the disclaimer at the bottom of the page. Similar to other outside tools, and widgets, you add to your website the liability is with the vendor. This also addressed in the annual licensing agreement for Max.

That's a lot of text to read in a very narrow box. Is there a more readable way to present the output?	You can copy the thread and then easily email or paste into any other kind of document.
OK. That's understandable, but that's making the user work and take extra steps to simply read the output. That's not user friendly at all. It makes the tool unappealing.	It is easy enough to expand the window and set Zoom settings. As you can see, this rendering is only about 50% of the screen so is naturally pinching a bit just because of Zoom. You can do the demo and I think you will see it works very well. But the whole point of having all the demo offerings is to get good feedback like this.
Will you compare Frank vs Max?	Frank is for very technical questions which generally would be shared with professional advisors, and specifically for a Gift Planner to research various scenarios. Max is a donor guide answering questions in more donor-friendly ways with links to donor resources.
Are there ways to reduce the inaccuracies? Can you tell the AI tools to highlight anything in the results that might not be factual or that's unconfirmed?	The best ways to reduce inaccuracies is to directly curate the source materials. The 5 million words are selected based on trusted sources... not everything that may or may not live on the internet. So, we aren't seeing any inaccuracies with Frank or Max where we see a ton (at least right now) with ChatGPT and similar.
Can the Max tool also reference specific information from the client? If an organization wanted Max to be able to answer questions about a legacy society or benefits that are organization specific?	Absolutely. As previously mentioned, we've had several organizations ask us if we can include their content and personalize the bot specifically for their organization. We can discuss this.