



Smarter, Faster, Kinder: Ethical AI Tools Every Gift Planner Should Be Using Now

Cherian Koshy, CFRE, CAP®

Kindsight

Kindsight

A gift that almost
didn't happen.



AI is everywhere. Gift planning is sacred.



What this session isn't

1. Not automation theater
2. Not hype
3. Not replacing judgment
4. Yes to ethics
5. Yes to real workflows



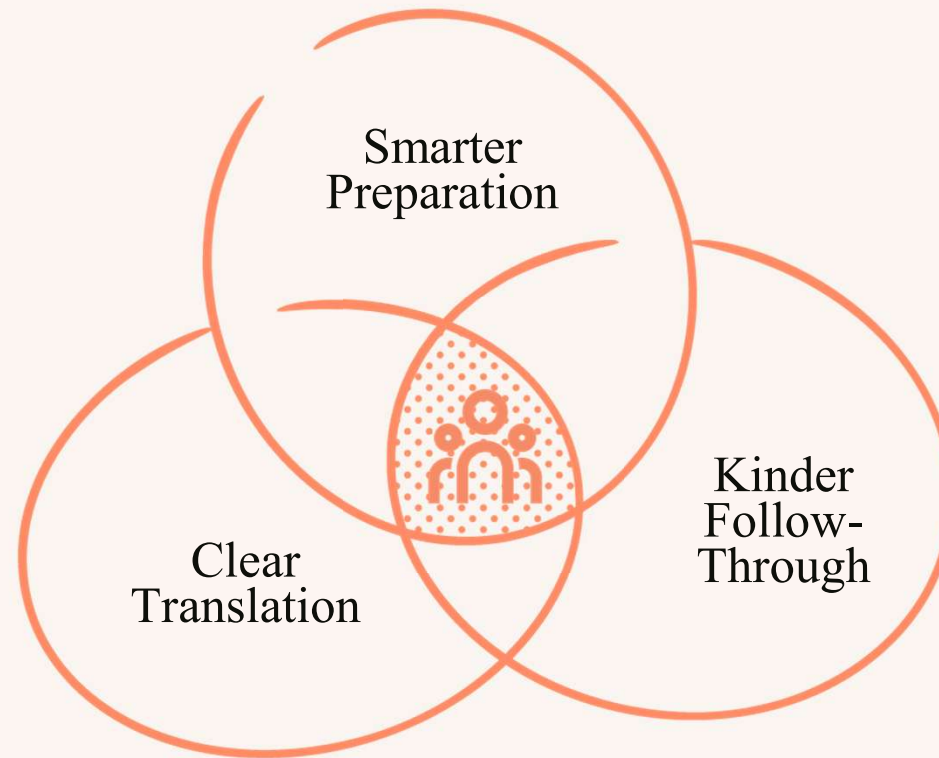
AI should amplify preparation, clarity, and
care — not replace judgment.



Gift planning friction happens before
and after conversations.

Kindsight



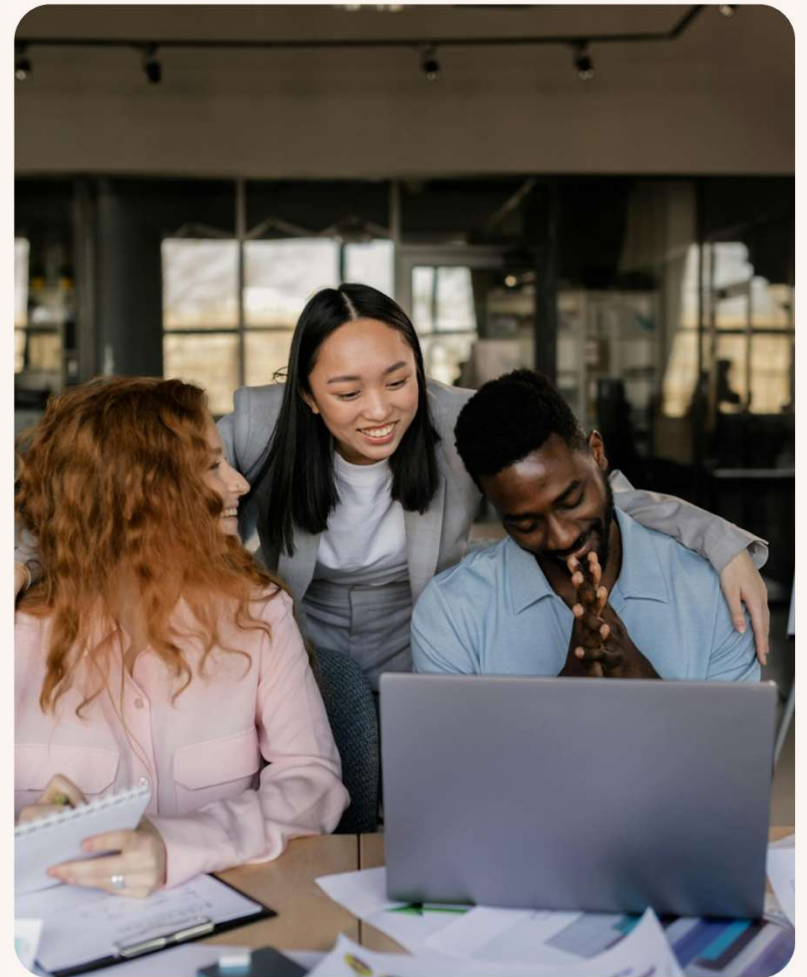


The Three Ethical Use Zones



Smarter Preparation

Better preparation leads to better conversations.



What AI Can Ethically Surface

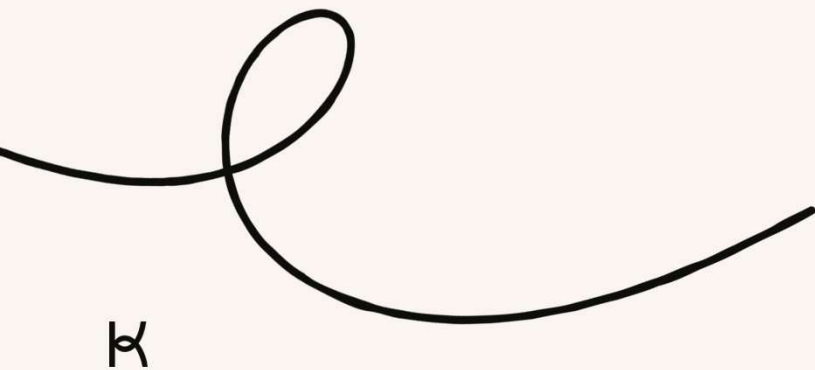
- Likely motivations
- Identity signals
- Readiness cues
- Questions worth asking



LIVE DEMO #1



AI didn't give answers. It gave better questions.



Clear Translation

CRTs

CGAs

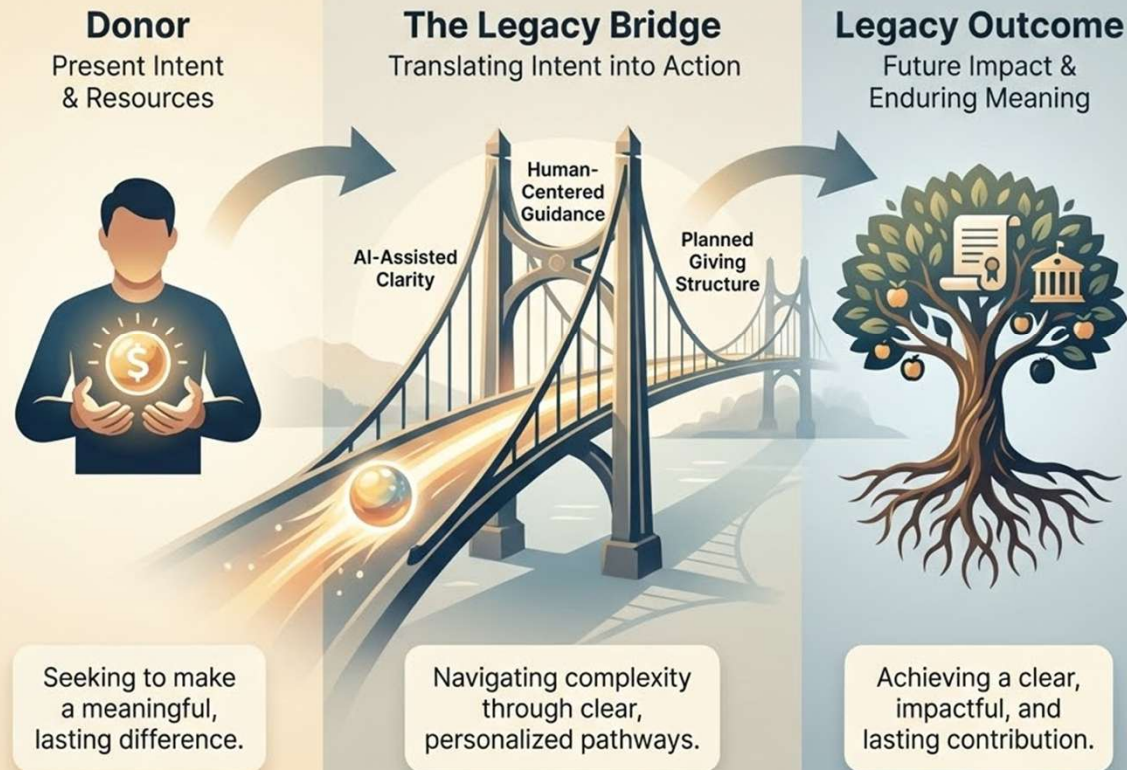
Pooled Income Funds



“Like crossing a bridge...”

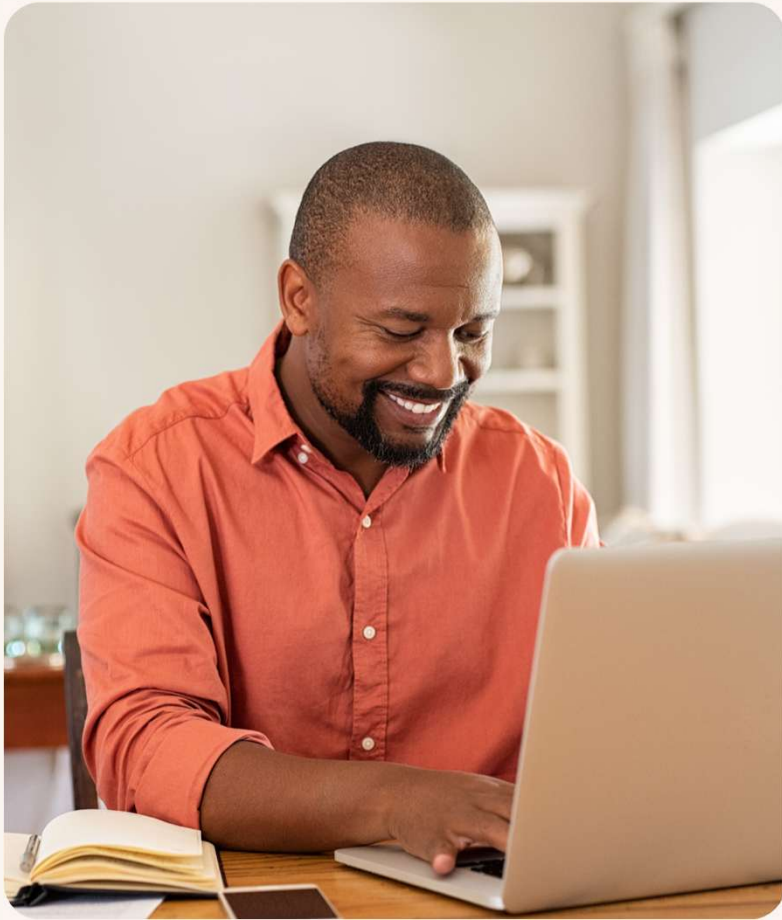


The Legacy Bridge Model: Donor → Bridge → Legacy Outcome



LIVE DEMO #2





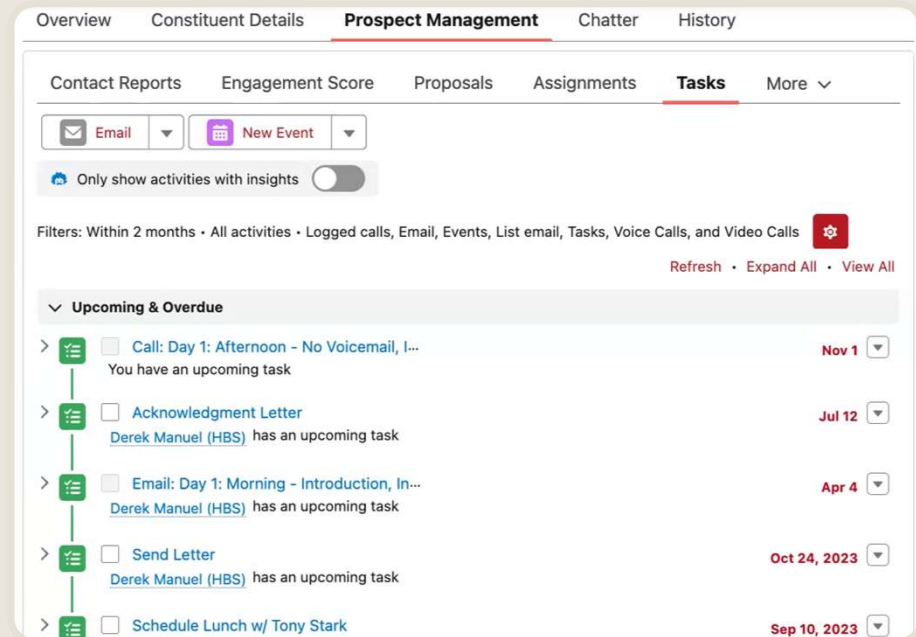
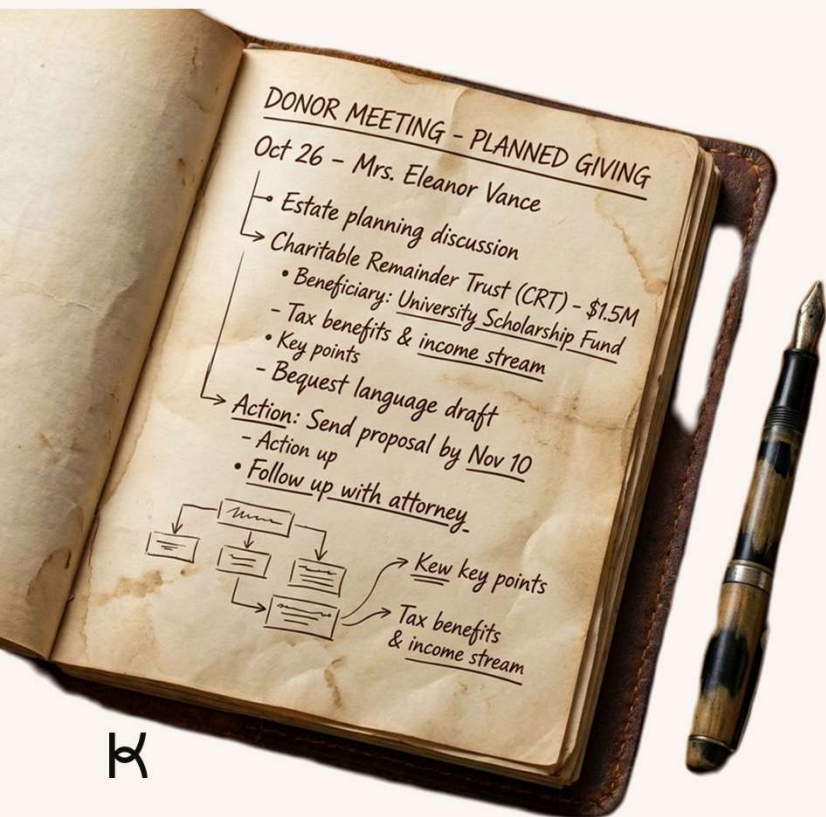
Kinder Follow-Through

Stewardship is where trust compounds.



The Reality of Notes

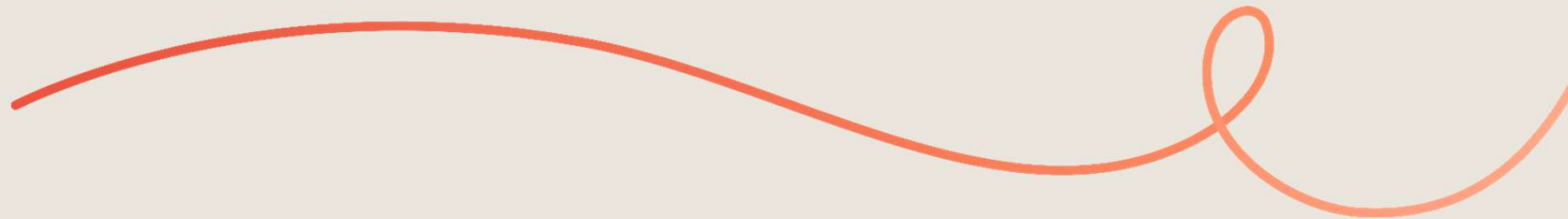
Messy notes. Little time. High expectations.



LIVE DEMO #3



AI drafts. Humans decide.



GUARDRAILS & CONFIDENCE

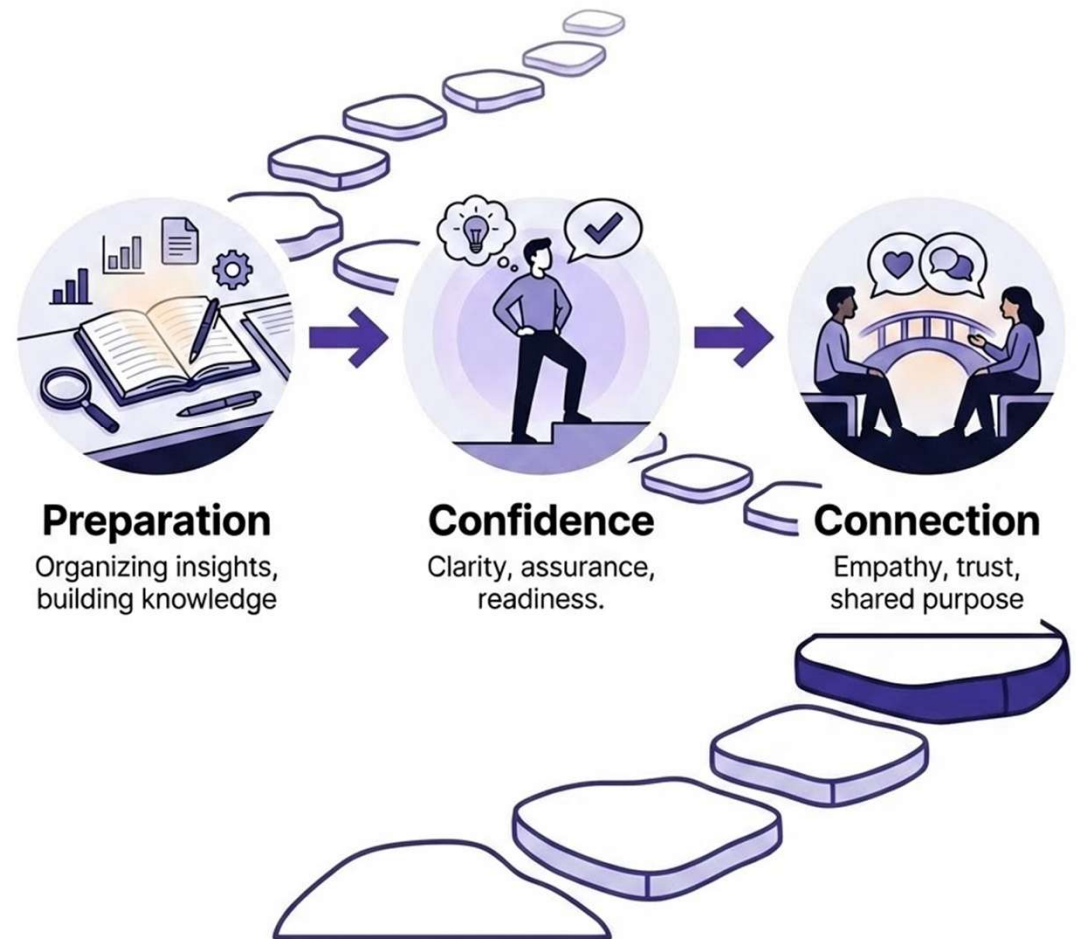


Additional Final Ethical Guardrails

1. No PII
2. No automated judgment
3. No sending without review
4. Transparency internally



Prepared Presence



LIVE DEMO #4



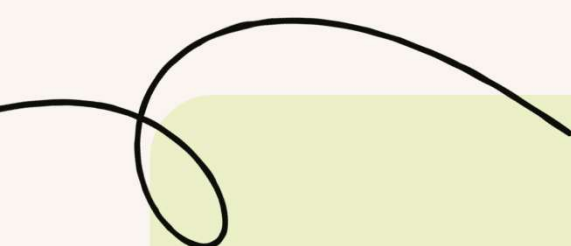
Where to Start This Week

1. Prep for one meeting
2. Translate one gift
3. Draft one follow-up



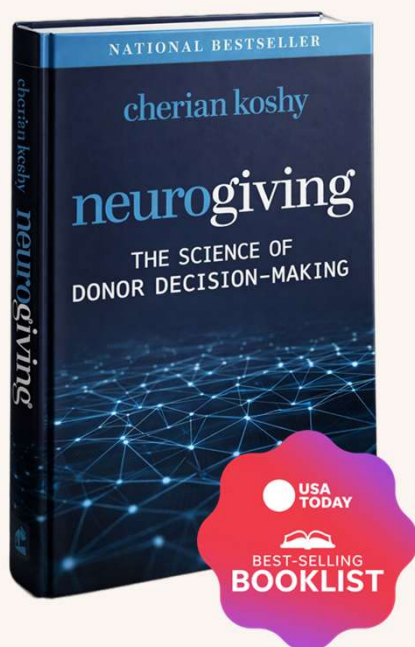
AI is not the voice in the room.
It's the note in your pocket.





Where would being more prepared, clearer,
or kinder change a donor's experience?

Thank *you!*



Cherian Koshy, CFRE, CAP®

Vice President
Kindsight

 [linkedin.com/in/cheriankoshy](https://www.linkedin.com/in/cheriankoshy)
www.neurogivingbook.com

