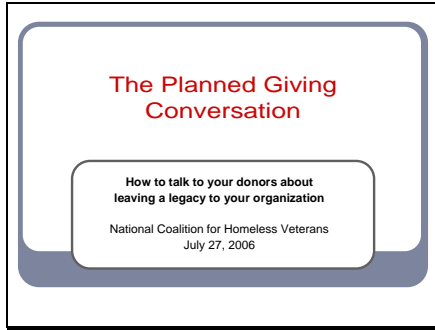
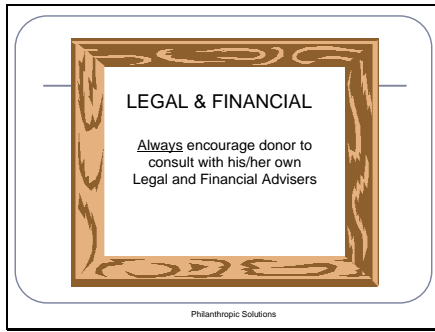


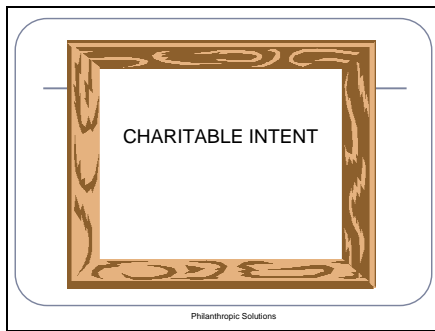
Slide 1



Slide 2



Slide 3



Slide 4

Planned Giving Offers an organization creative ways to maximize individual donations.

- Cash
- Appreciated securities
- Real estate
- Personal property
- Insurance
- Retirement assets
- And more ...

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Slide 5

More Complex...But Larger Gifts.

- Gifts are often deferred.
- Usually part of a donor's estate or financial plan.

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Slide 6

Who Makes Planned Gifts?

- Older donors
- Long-time donors
- Board of Directors
- Former staff & retirees
- Beneficiaries

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Readiness to Make a Planned Gift

- Ability
- Inclination/Charitable Intent

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Why Do Donors Make Planned Gifts?

- They support your cause.
- Tax benefits.
- Life income option.
- Manage inheritance for heirs.

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Facilitators and Allies

- Attorneys
- Accountants
- Financial Advisers
- Insurance Brokers
- Stock Brokers
- Trust Officers

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Tax Benefits

- Income tax deduction
- Reduce or avoid capital gains tax
- Reduce or avoid estate tax
- Reduce or avoid gift tax

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Income Benefits

- For donor and/or spouse
- For children
- For others
- For life
- For term of years

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Revocable Planned Gifts

Bequests

- Will
- Living Trust
- Beneficiary designation

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Bequests

- 70%+ of planned gifts
- Where there's a will there's a way
- Attentiveness counts

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Types of Bequests

- Specific bequest
- Percentage bequest
- Contingency bequest
- Residue

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Beneficiary Designation:

- Retirement Plan
- Life Insurance Policy

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Irrevocable Planned Gifts

- Gift Annuity
- Charitable Remainder Trust
 - Option to change charity
- Charitable Lead Trust
- Retained Life Estate
- Bargain Sale

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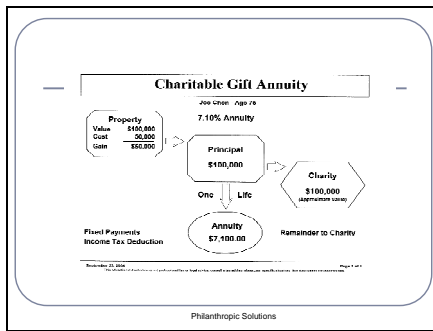
Slide 17

Life income – Gift Annuity

- Cash, stock
- Income – Fixed
 - 70 yr old=6.5% -- 90 yr old=11.3%
- Simple, straightforward
- Tax benefits

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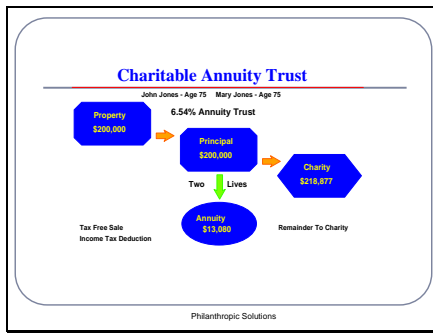
Slide 19

Life income - Charitable Remainder Trust

- Cash, stock, property
- Income: Annuity Trust or Unitrust
- Donor options
- Tax benefits

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Slide 20



Slide 21

Intergenerational Transfer of Wealth - the \$40 Trillion

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Slide 22

Pre-Conversation Environment

- Communications
- Creating a PG community
- Reputation for fiscal responsibility

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Pre-Conversation: Timing

- Acquiring or selling major asset
- Family restructuring
- Business or career event
- Special needs of family member
- Retirement

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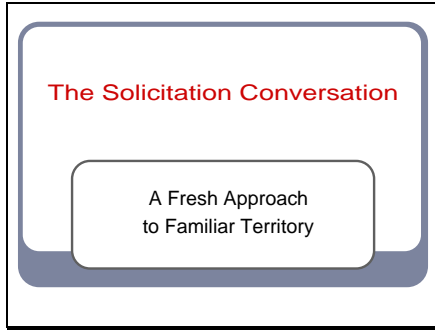
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Heart and Mind Questions

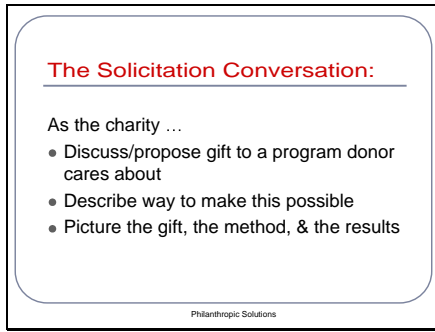
- Charitable intent
- Financial situation, control issues
- Personal and family matters

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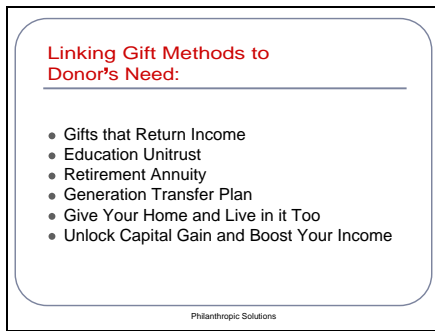
Slide 25



Slide 26



Slide 27



Slide 28

Presenting Gift Methods:

Life income – Gift Annuity

- Cash, stock
- Income
- Simple, straightforward
- Tax benefits

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Slide 29

Presenting Gift Methods:

Life income – Charitable Remainder Trust

- Cash, stock, property
- Income
- Donor options
- Tax benefits

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Slide 30

Presenting Gift Methods:

- Don't Neglect Bequests!
- Remember the 70%

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After Making the Proposal ...

**WAIT
LISTEN**

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The Solicitation Conversation:

- Answer questions
- Handle objections
- Gauge whether to continue or let it go

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After the Solicitation:

- Establish what donor needs to do
- Establish what you will do
- Ask donor when and how he/she would like you to follow up
- Return to cultivation mode
- Summarize next steps before you leave

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Following Up:

- Send written summary of proposed gift with supporting material, reminder of what you will do, and what donor agreed to do
- Call and set date to meet and review proposal in detail

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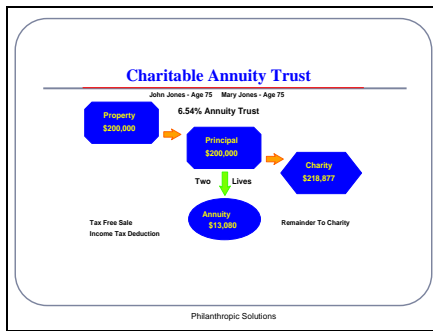
Slide 35

Supporting Materials – Slow Down!

- Program information
- Planned giving brochure
- Gift illustrations

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Slide 37

Conversing with the Donor's Team

Differentiate roles:

- Family member
- Financial advisor
- Attorney
- Charity representative

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Slide 38

Gift Closing Conversations:

- Coordinate
- Apprise
- Thank
- Steward

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Slide 39

Planned Gifts Create a Win/Win:

Great for your organization:

- Brings in bigger gifts
- Builds donor loyalty
- Ensures stable future

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Planned Gifts Create a Win/Win:

Great for donors:

- Tax benefits
- Lifetime income option
- Leave a legacy for future generations

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Slide 41

It's not how a donor feels about the gift, it's how the gift makes a donor feel about himself.

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Slide 42

Further Resources

- National Committee on Planned Giving
 - * www.nccpg.org
- Leave A Legacy
 - * www.leavealegacy.org

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Further Resources

- Planned Giving Design Center
 - www.pgdc.com
- Crescendo Interactive
 - www.crescendointeractive.com
- PG Calc
 - www.pgcalc.com

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