

**MAJOR AND PLANNED
GIVING:
It's **NOT** Rocket Science!**

Tia Graham, NPR

Debbie Eliason, WAMU 88.5 FM

ERPM October 25, 2011

Today's Objectives

- **Make the Case for a Planned Giving Program**
- **Tools for you to Implement the Basics**
- **Ways to Measure Outcome and Success**

The Changing Landscape

- **Wealth Transfer**
- **Challenge of Aging Donor Population**
- **What's my timeframe?**



Dad, did you know that a one time gift of \$1,000 could endow my allowance?

Mystery Removed

**It's all about endowing (at a minimum)
the annual gift**

**How Much Could Your
Planned Giving Program
be Worth?**

Bequest Potential Worksheet*

- **Step 1: Size of database = 20,000 Records**
- **Step 2: Number of records x 5.3% = 1,060 Low-end number of potential donors**
- **Step 3: Number of records x 33% = 6,600 High-end number of potential donors**
- **Step 4: Low-end number of potential donors/3 = 353 the revised low-end number of potential donors**
- **Step 5: High-end number of potential donors/3 = 2,200 the revised high-end number of potential donors**
- **Step 6: Estimated number of low-end potential donors x \$ 35,000 = \$ 12,355,000 potential dollars**
- Take the estimated number of low-end potential donors (Step 4) and multiply by \$35,000, which is what some believe to be at or near the average bequest value in the United States. Alternatively, you can multiply the number of potential donors by your organization's average bequest gift value, being sure to deduct any unusually large gifts when calculating the average. The result is the gross potential dollars that could come from future bequest gifts at the low-end. Of course, this does not take into account the growth of the donor base (Step 1) over time.

Bequest Potential Worksheet*

- **Step 7: Estimated number of high-end potential donors x \$35,000 = \$ 77,000,000 potential dollars**
- Take the estimated number of high-end potential donors (Step 5) and multiply by \$35,000, which is what some believe to be at or near the average bequest value in the United States. Alternatively, you can multiply the number of potential donors by your organization's average bequest gift value, being sure to deduct any unusually large gifts when calculating the average. The result is the gross potential dollars that could come from future bequest gifts at the high-end. Of course, this does not take into account the growth of the donor base (Step 1) over time.
- **Step 8: Summary**
- **Low-end potential donors (Step 4): 353**
- **Low-end potential dollars (Step 6): \$ 12,355,000**
- **High-end potential donors (Step 5): 2,200**
- **High-end potential dollars (Step 7): \$ 77,000,000**

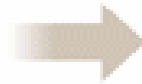
**NOW.....Do We Have Your
Attention?**

- **Let's Define the Basics (Tools!)**
- **Do I have to be or hire an expert?**
- **How much is this going to cost the station....seriously?**

Charitable Gift Annuity



STOCK OR CASH



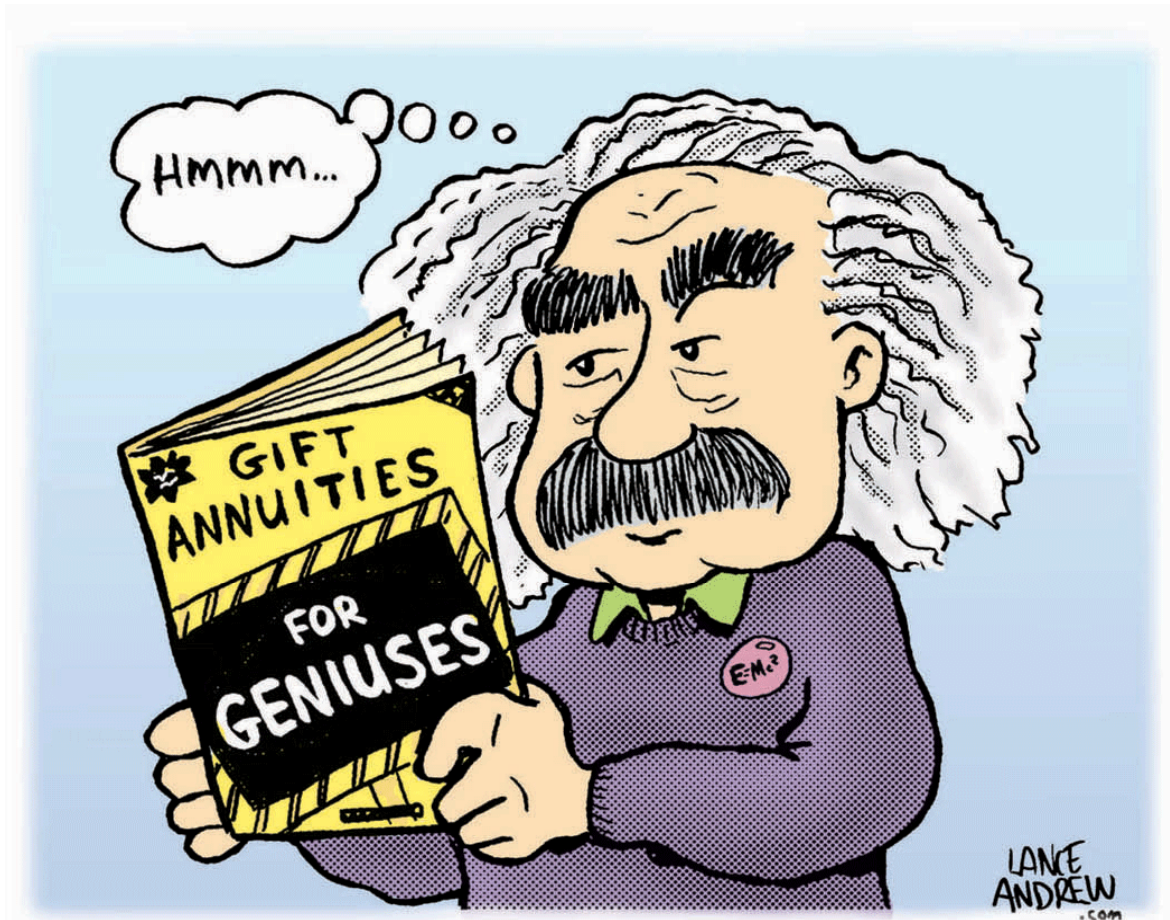
GIFT ANNUITY



CHARITY



DONOR



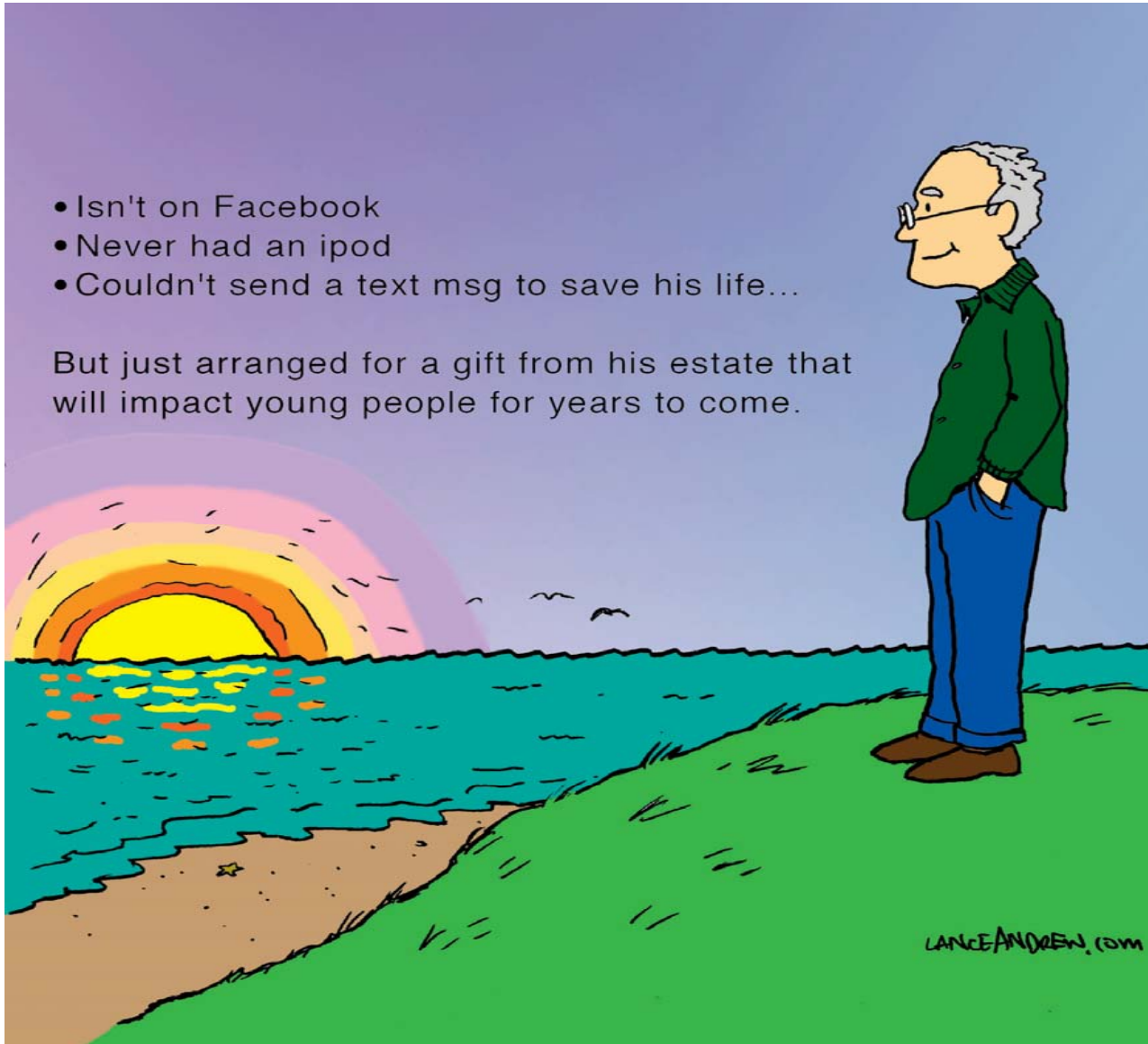
Really it's simple: Help your favorite charity and receive an income for life at the same time. Contact your favorite charity today to learn more.

Measuring Success

- **Intentions and Realizations**
- **Setting a Reasonable Goal**
- **Stewardship Plan**

- Isn't on Facebook
- Never had an ipod
- Couldn't send a text msg to save his life...

But just arranged for a gift from his estate that will impact young people for years to come.



LANCEANDREW.COM