

Planned Giving: Beginning to End



Tuesday March 14, 2023

MARIE KOSANOVICH

Vice President, Accounts
Lautman Maska Neill & Company

What We'll Cover Today

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Giving Is So
Important

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Do's & Don'ts

The slide features a dark teal background with a lighter teal horizontal band at the bottom. Six teal brushstroke-like shapes are arranged in two vertical columns of three on either side of the central text.

Why Planned Giving Is Important

The Sheer Numbers



- By **2030**, all baby boomers will be older than age 65
- The population of Americans age 85 and older is expected to more than double from **6.6 million** in 2019 to **14.4 million** in 2040

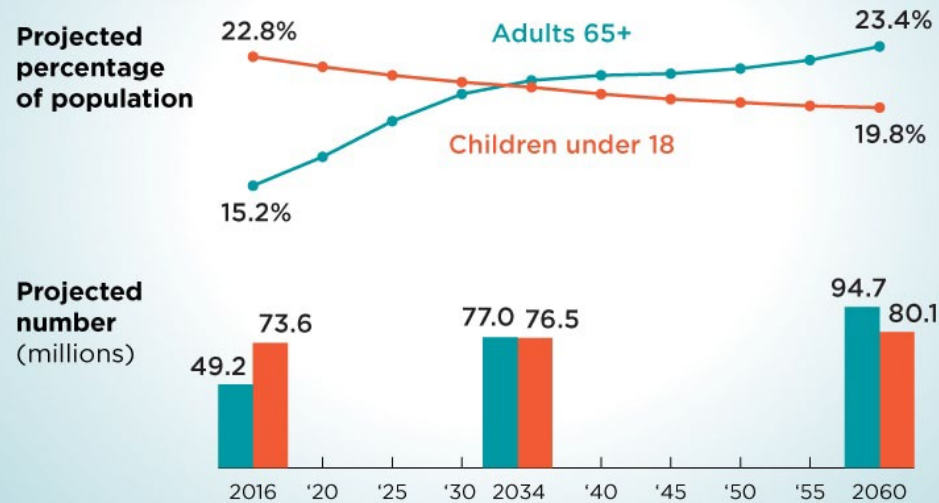
Source: US Census Bureau's 2017 National Population Projections & Administration for Community Living ([acli.gov](https://acli.org))



An Aging Nation

Projected Number of Children
and Older Adults

For the First Time in U.S. History Older Adults Are
Projected to Outnumber Children by 2034



Note: 2016 data are estimates not projections.

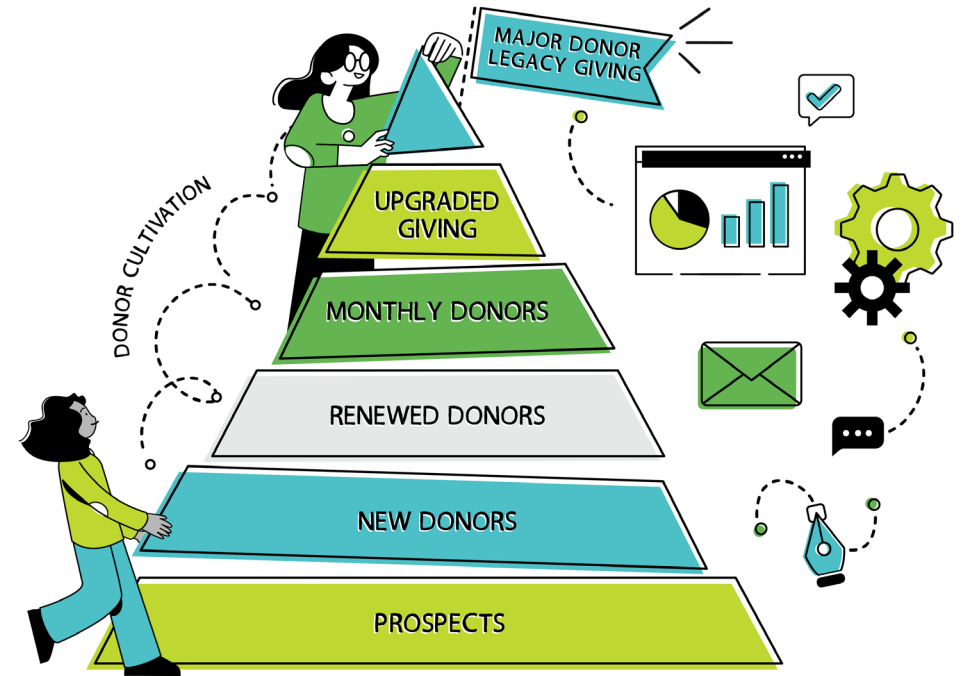
United States®
Census
Bureau

U.S. Department of Commerce
U.S. CENSUS BUREAU
[census.gov](https://www.census.gov)

Source: National Population
Projections, 2017
www.census.gov/programs-surveys/popproj.html

What that
looks like

Where Do Planned Gifts Come From?



Before You
Begin ... Make
Sure Your
“House” Is In
Order!



ASK YOURSELF:

- Who will reach out to donors who ask for more information?
- Do we have materials on hand to send to donors?
- Is our website in “sync”?
- Who is responsible for updating donor records?
- What flags do we have to indicate
 - Interest in planned giving?
 - Committed to PG?
 - Received legacy gift?

The background is a dark teal color. On the left and right sides, there are several teal-colored brushstroke shapes of varying lengths and orientations, arranged in a way that frames the central text.

Communication Strategy

WHERE DO I EVEN BEGIN?

Beginner Level:

Add a check box to all reply forms to let donors "Raise Their Hand" about wanting additional information

| | |
|--|---------------|
| I'd like to make a <input type="checkbox"/> one-time <input type="checkbox"/> monthly gift of \$ _____ by credit card: <input type="checkbox"/> Visa <input type="checkbox"/> Mastercard <input type="checkbox"/> Discover <input type="checkbox"/> American Express | |
| CARD NUMBER | EXP. DATE |
| NAME ON CARD | SECURITY CODE |
| SIGNATURE | |
| PHONE NUMBER <i>(in case we have questions)</i> | |

Become a Monthly Donor

Generous donors who make monthly gifts provide Meals on Wheels San Francisco with the steady income to provide nutritious meals, friendship, and other critical services to homebound seniors.

☐ Yes! I would like to make a monthly contribution to support Meals on Wheels San Francisco. Please enroll me with a monthly gift of \$_____.

I have provided my credit card information at the left.

SIGNATURE (REQUIRED)

☐ Please send me information on how to remember Meals on Wheels San Francisco in my will.

☐ Please send me information on volunteering. My email/phone # is: _____.

☐ My company has a matching gift program. I have completed the form and enclosed it with my contribution.

☐ Please add me to your email list so that I may receive additional information. My email address is: _____

Beginner Level:

Include a buckslip in your acknowledgements about legacy gifts



CHESAPEAKE BAY FOUNDATION
Saving a National Treasure

CBF.ORG/PLANNEDGIVING

Leave a Legacy for the Bay

You can help protect the Bay far into the future by including CBF in your will or estate plan, or by funding a charitable gift annuity that pays you income for life.

You can secure your retirement, provide for your family, and leave a legacy of clean water. And CBF enjoys increased security so we can achieve our mission of a saved Bay.

For more information, please visit cbf.org/plannedgiving.

©CBF/Lee Goodwin

PHILIP MERRILL ENVIRONMENTAL CENTER
6 HERNDON AVENUE | ANNAPOLIS, MD 21403 | 888/SAVEBAY (728-3229) | CBF.ORG

Intermediate Level:

Targeted Mail Solicitations

- Self-mailer

Leave a Gift to HRC in Your Will or Trust

As our community and the world face extraordinary challenges, many HRC supporters want to take an important step to protect their families and leave their legacies by preparing a Will.

We are pleased to let you know that we now have access to an estate planning service for our supporters, through Giving Docs. HRC has arranged for this service to be free of charge — and you can update or change your plans as often as you like, at any point along the way.

To get started, visit hrc.im/givingdocs to create your profile with Giving Docs.

If you have any questions about how to use this service, or about how to leave a gift to HRC through your estate plan, please contact:

Jade Bristol Verity

Pronouns: She/her/hers

Director of Estate Planning

(202) 216-1563 | jade.bristol.verity@hrc.org

FREE ESTATE PLANNING DOCUMENTS FOR HRC SUPPORTERS

NEW!



Intermediate Level:

Targeted Mail Solicitations

- "Invite" Mailings

Kate Nelson



I'm writing to you with a very special invitation

Jane Q. Sample 03_23 PF PG
Company Name
1730 Rhode Island Ave., NW
Suite 301
Washington, DC 20036



Kate Nelson
Associate Vice President, Individual Giving

March 2023

Dear [Salutation],

I wanted to share the enclosed note from Luther with you because I think you have a lot in common.

You are both fierce supporters of the Parkinson's Foundation and show a passion for ending Parkinson's disease (PD) once and for all.

As you'll read, Luther is one of the more than one million Americans living with PD. In support from the Parkinson's Foundation, Luther can help keep that others with PD can do the same. Luther wants to leave a legacy and decided to name the Parkinson's Foundation in his will.

FROM THE DESK OF

Luther Tweeten

Dear Friend,

Most people make a legacy gift to a non-profit for very personal reasons. The same is true for me. Not only did I watch my father battle with Parkinson's disease (PD), I was diagnosed with Parkinson's myself.

After my diagnosis, I wanted to understand as much as I could about PD and learn the best ways to make an impact on research. My neurologist pointed me toward the Foundation, saying it was a great organization to support research towards a cure.

From expert care, awareness and an emphasis on scientific research, I learned how hard the Parkinson's Foundation works to improve the lives of people with PD. Thanks to the Parkinson's Foundation, I have found great occupational and physical therapists through its Global Care Network! I also enjoy reading the Foundation's research publications to see how scientists, with the support of the Parkinson's Foundation, are doing all they can to help the PD community.

But most of all, the Parkinson's Foundation's emphasis on research gives me hope. Hope that by pioneering PD research, pushing for innovation in scientific discovery and working day in and out with those living with the disease ... we will cure Parkinson's once and for all.

When that cure happens, I want to be a part of it. That is why I've named the Parkinson's Foundation as a beneficiary in my will. It's a way for me to make the fight against PD a part of my personal legacy — ensuring I play a role in advancing research and medical science toward a cure, no matter how long it takes.

If you have had a similar journey, you may also want to consider including the Parkinson's Foundation in your estate planning and joining the Legacy Society. I have hope that, together, we truly will create a world without Parkinson's disease.

Sincerely,

Luther B. Tweeten

Luther Tweeten
Parkinson's Foundation supporter and
Legacy Society member



LEGACY SOCIETY
R.S.V.P.

TO: Kate Nelson
Associate Vice President, Individual Giving
Parkinson's Foundation
200 SE 1st Street, Suite 800
Miami, FL 33131

FROM: Jane Q. Sample
Company Name
1730 Rhode Island Ave., NW
Suite 301

SOURCECODE ID123456789

☐ **YES!** I want to learn how I can help sustain the future work of the Parkinson's Foundation, including efforts to improve care and advance research toward a cure. Please send me information on how I can become a part of the **Legacy Society** by including the Parkinson's Foundation in my estate plans.

☐ Please contact me by: ☐ Phone _____ ☐ Email _____

Please check all that apply and return this form in the envelope provided.

☐ I'd like to know how I can name the Parkinson's Foundation in my will, living trust, life insurance policy or retirement plan. Please send me more information.

☐ I'd like to know how I can make a charitable gift annuity to the Parkinson's Foundation, retaining the use of the income it generates during my lifetime. Please send me more information.

☐ I have already named the Parkinson's Foundation, National Parkinson Foundation or the Parkinson's Disease Foundation in my will, living trust, life insurance policy or retirement plan. Please contact me to activate my Legacy Society membership.

☐ I cannot commit to making a legacy gift today, but I will make a special contribution of \$ _____.

Other Ways to Give



Donor Advised Funds (DAF)

Make a larger impact and support the Parkinson's community through this tax-efficient giving option.



IRA Charitable Rollovers

Explore making the gift of a Qualified Charitable Donation (QCD) directly from your IRA. This type of gift helps save on taxes and further our mission.



Stock and Other Securities

Donating a charitable gift of stock or mutual fund shares helps further Parkinson's disease research and allows you to receive a tax deduction.

Considering a Bequest
to the Parkinson's
Foundation?

TURN OVER TO FIND OUT MORE >

As you'll read, Luther is one of the more than one million Americans living with PD. In support from the Parkinson's Foundation, Luther can help keep that others with PD can do the same. Luther wants to leave a legacy and decided to name the Parkinson's Foundation in his will.

Luther has joined our Legacy Society — a special group of people who have included a gift to the Foundation in their estate to fuel our work far into the future and create a lasting impact.

Our commitment to our mission, I am inviting you to become a member of the Parkinson's Foundation's Legacy Society. A part of this special group is an incredibly powerful dedication to ending Parkinson's lives on for years.

Joining our Legacy Society, but the most common is through a bequest to the Parkinson's Foundation as a beneficiary in your will, as part of a life insurance policy or retirement plan. You will leave a legacy and appreciated throughout the Parkinson's community, reducing your family's tax burden.

By specifying a dollar amount or asset, giving a percentage of your estate to the balance of your estate. If you don't have a will — a tool that allows you to start your legal will, at no cost,

and gifts that may be right for you. Please visit our website, for more information — and read about your options. You also have opportunities that would provide you with income for life, and any Legacy Society members value the guaranteed lifetime income.

(over, please)

MIAMI, FL 33131 | PARKINSON.ORG | HELPLINE: 800-4PD-INFO

Intermediate Level:

Targeted Mail Solicitations

- Planned Giving Newsletters



WHAT WILL YOUR LEGACY BE?

CREATE YOUR LEGACY

PLAN FOR TOMORROW. PLAN FOR A CURE.

Putting your own protections in place and establishing a life plan is a way to assert control and gain peace of mind. We're here to help you get started:

- ☐ I would like to receive a complimentary life and estate planning guide to start planning for the future.
- ☐ I would like to discuss creating my legacy:

DAYTIME PHONE

EMAIL ADDRESS

- ☐ I have already left a gift in my will, trust or by beneficiary designation to The ALS Association.

Chris Q Samplename
Address1
Address2
Address3
City, ST ZIP34



[Office Name]
[Address 1]
[Address 2] | [City], [ST] [ZIP]
PG22102

01234567890123456789

During times of uncertainty and volatility, your de confidence as we stay on course to serve and support pe their families. I hope you find inspiration throughout thi supporting our mission with a legacy gift as Millie and m The Legacy Society can help make sure that we can defe soon as possible.

Thank you for all you have done and continue to de and bring hope to so many. Please get in touch today.

Sincerely,

[PG Signer]
[PG Title]

P.S. [Salutation], to learn more about creating your legacy, please return the enclosed form, call or email us today.

[PG Contact Name]
[PG Contact Number]
[PG Contact Email address]

U_P0021_C



THE LIFE AND LEGACY NEWSLETTER

PREPARED FOR [DONOR NAME]

Vol 1 Issue 1 | Winter 2021

HELPING FAR INTO THE FUTURE

MILLIE AND DON ARNOLD'S STORY

Millie and Don Arnold's almost 27-year marriage began thanks to a chance encounter. Don was a manager of a grocery store in Piqua, Ohio, where Millie stopped in to pick up supplies. They became friends and kept in touch for several years before later marrying. Throughout their marriage they enjoyed traveling together, wanting to get the most out of life.

more about living with ALS, they attended a support group provided by their local ALS Association chapter.

Don remained active and mobile for a little more than 16 months until his passing – on his terms – in February 2000.

Millie moved back to Ohio and contacted the local ALS Association chapter, where she attended a support group. Millie became more involved, organizing the first Dayton Walk to Defeat ALS, serving as the Dayton Walk city chair and ultimately joining the Chapter's Board of Directors, where she would serve as president for four years.

In 2010, almost 10 years after Don lost his battle with ALS, Millie began exploring ways to make a gift to The ALS Association that would also provide security for her and her two younger brothers as part of planning her estate. After considering her options, Millie decided to use Don's life insurance policy to fund a

Charitable Remainder Annuity Trust. This gift offered a steady income for her and her brothers for life and at their passing, an impactful gift for her local ALS Association chapter. When Millie was asked what inspired her to make this gift, she stated: "This is my legacy to my husband, Don. This is his legacy."

Today, Millie continues her and Don's legacy by serving on The ALS Association's National Board of Trustees, ensuring we can respond to the needs of the ALS community through advocacy, care services and research.

If you'd like to become more involved, check out our opportunities by visiting www.als.org/get-involved/volunteer

Important disclaimer: Information provided in this newsletter is for educational purposes only. We encourage you to consult your legal or tax advisor for your situation.

THE LIFE AND LEGACY NEWSLETTER | ALS.PLANNEDGIVING.ORG

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Targeted Mail Solicitations

- 777 6th Street, NW, Suite 700 | Washington, DC 20001-3723 | P 202-223-6722 | F 202-872-0960 | npca.org

Intermediate Level:

Advertise In Your In-house Magazine

**With one action...
Fight hunger and
poverty today...
and help end it
tomorrow.**

**PARTICIPATE IN
HEIFER'S 2020
LEGACY CHALLENGE!**



There has never been a better time to include Heifer in your Will or Estate Plans. When you set up a legacy gift today, a generous donor will match 10 percent (up to \$10,000 per disclosed gift) of the amount you indicate. The additional donation will be put to use immediately to fight hunger and poverty today.

It's easy to make an impact that will be felt today – and tomorrow!

- Add Heifer to your Will or Estate plans – contact us to find out how!
- If you've already put Heifer in your Will or Estate plans – let us know!
- Activate the matching gift by providing us with information about your legacy plans.

Name Heifer in your Will to ensure your impact long into the future. And if you act today, 10% will be matched and immediately start fighting hunger and poverty!

Contact Debbie McCullough,
Vice President

Call her:
888-422-1161

Email her:
Debbie.McCullough@heiferfoundation.org

Find out more:
HeiferFoundation.org

"Heifer is our
to the rest of
-Legacy C

**A lifetime
of generous
returns ...**

**FOR THEM AND FOR
YOU THROUGH A
HEIFER FOUNDATION
CHARITABLE GIFT
ANNUITY**



When you create a secure Heifer Foundation Gift Annuity, you'll support families around the world like Emmy and Prudence's, and at the same time, you'll receive a life of generous returns.

Just think...

- The rate of return you'll receive for your gift annuity is the highest it's been in many years.
- You'll receive an income tax charitable deduction and potentially tax-free annuity payments.
- As you receive your return, you'll know families around the world are doing the same.

Please contact us today and we can create a personalized illustration for you.

| Heifer Gift Annuity Rates (Rates are based on a single life) | | | | | | |
|--|------|------|------|------|------|------|
| Current age | 65 | 70 | 75 | 80 | 85 | 90 |
| Rate | 5.1% | 5.6% | 6.2% | 7.3% | 8.3% | 9.5% |

Rates current as of August 2018. The rate you or your beneficiary receives is calculated based upon the applicable annuitant's age at the time of the gift.

**You'll receive a lifetime of generous returns
while helping families around the world.**

**These
Rates Are
Great!**



When Emmy and Prudence received a goat from Heifer International, they didn't just get milk that will help sustain them tomorrow; they received a way to provide their family with a better income long into the future.

It's all part of Heifer's work with communities to increase income, improve child nutrition, care for the Earth, and ultimately end world hunger and poverty.



For information on annuities or other ways to support Heifer through the Foundation, please contact Debbie McCullough at 501-907-4922 or Debbie.McCullough@heiferfoundation.org.

Advanced Level:

Educate donors about Beneficiary Designations

ALS Golden West Chapter ASSOCIATION

Gift Planning Help create a world without ALS

HOW TO GIVE

WHAT TO GIVE

LEARN ABOUT WILLS

DONOR STORIES

CALCULATORS

Beneficiary Designation Gifts

Free Estate Planning Guide

You are at: [Giving Home](#) > [Gift Options](#) > [How to Give](#) > Beneficiary Designation Gifts

Print

Email

Calculator

Brochure

Contact

A beneficiary designation gift is a simple and affordable way to make a gift to support the Golden West Chapter. You can designate the Golden West Chapter as a beneficiary of a retirement, investment or bank account or your life insurance policy.



```
graph LR; Donor --> DF[Designation Form]; DF --> AC[Account Custodian]; P[Property (IRA/Investment)] --> GWC[The Golden West Chapter]
```

Flowchart: Donor executes designation form with account custodian to designate the Golden West Chapter as the beneficiary of a retirement, investment, or bank account or life insurance policy.



Make a Future Gift of Retirement Assets

Search For My Custodian:
e.g.: Plan Custodian

Benefits of a beneficiary designation gift

- Support the causes that you care about
- Continue to use your account as long as you need to
- Simplify your planning and avoid expensive legal fees
- Reduce the burden of taxes on your family
- Receive an estate tax charitable deduction

How a beneficiary designation gift works

1. To make your gift, contact the person who helps you with your account or insurance policy, such as your broker, banker or insurance agent.
2. Ask them to send you a new beneficiary designation form.
3. Complete the form, sign it and mail it back to your broker, banker or agent.
4. When you pass away, your account or insurance policy will be paid or transferred to the Golden West Chapter, consistent with the beneficiary designation.

Important considerations for your future

If you are interested in making a gift but are also concerned about your future needs, keep in mind that beneficiary designation gifts are among the most flexible of all charitable gifts. Even after you complete the beneficiary designation form, you can take distributions or withdrawals from your retirement, investment or bank account and continue to freely use your account. You can also change your mind about your designation at any time in the future for any reason, including if you have a loved one who needs your financial help.

Contact us


If you have any questions about leaving a beneficiary designation gift to the Golden West Chapter, please [contact us](#). We would be happy to assist you.

If you have already designated the Golden West Chapter as a beneficiary of an asset or as part of your estate plan, please let us know. We would like to recognize you and your family for your gift.

Advanced Level:

Planned Giving Microsite

With recent changes to legislation under the SECURE Act 2.0, **the age in which IRA holders must take their required minimum distribution (RMD) has been increased to 73.** However, anyone age 70.5 or older can still make Qualified Charitable Distributions to their favorite charities. Please consult your financial advisor when making your philanthropic decisions.



[GIVE NOW FROM YOUR DONOR-ADVISED FUND](#) [DONATE](#)

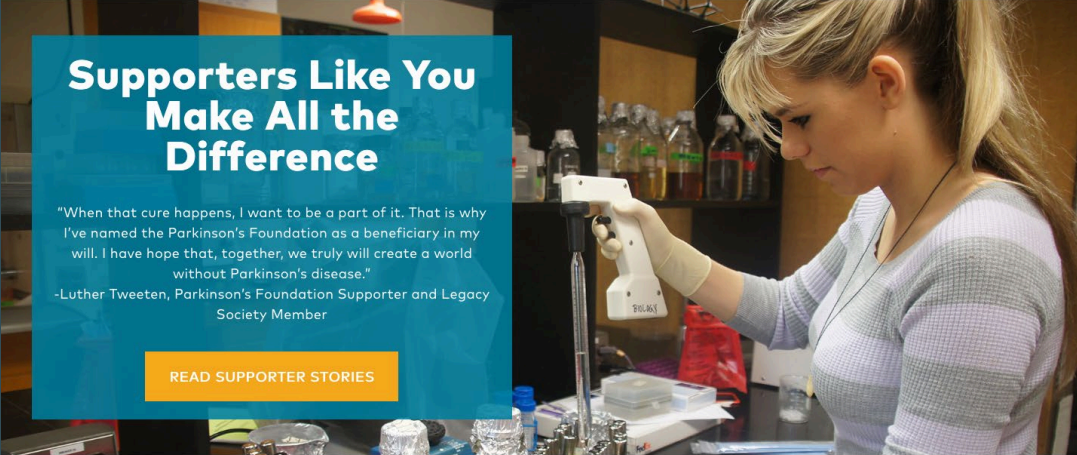
[GIVING TOOLKIT](#)

[Home](#) [Your Impact](#) [Ways to Give](#) [Supporters Like You](#) [Giving Societies](#) [Contact Us](#)

Supporters Like You Make All the Difference


"When that cure happens, I want to be a part of it. That is why I've named the Parkinson's Foundation as a beneficiary in my will. I have hope that, together, we truly will create a world without Parkinson's disease."
-Luther Tweeten, Parkinson's Foundation Supporter and Legacy Society Member

[READ SUPPORTER STORIES](#)




Without supporters like you, none of our work is possible. That's why we have created this website to help you follow your impact with the Parkinson's Foundation and learn more about how to partner with us to make life better for people with Parkinson's disease by improving care and advancing research toward a cure.


How You Support Our Work



Advance Research
Fueling innovative research that leads to breakthroughs in treatment and improved care for people with Parkinson's.



Improve Outcomes Through Care
Expanding access based on findings that people with Parkinson's who receive skilled care are at a lower risk of complications and have better quality of life.



Educate & Empower
Providing crucial resources for those affected by this disease, including tools and information that help newly diagnosed people, care partners and veterans with Parkinson's.

[LEARN MORE](#)

Advanced Level:

Provide Access to
tools such as
FreeWill.com

The Actors Fund
729 Seventh Avenue, 10th Floor
New York, NY 10019
actorsfund.org

Dear [Name],

Thank you for being a dedicated supporter of The Actors Fund. Your commitment enables us to be a safety net for the performing arts and entertainment community during this critical time.

And now, you can help ensure The Actors Fund remains as strong in the future as you've helped it become today—to ensure the show goes on for years to come.

When you add The Actors Fund to your estate plans or make a legacy gift, you'll foster stability and provide critical assistance as we help meet the needs of the performing arts and entertainment community whose lives have been impacted, now by COVID-19, and by other emergencies in the future.

To learn more, contact Jay Haddad at 917.281.5928 or jhaddad@actorsfund.org, or visit actorsfund.org. Thank you for your commitment to our performing arts family. We are stronger because of you!

With much appreciation,


Joe Benincasa (he, him, his)
President and CEO

P.S. August is Make-a-Will month! The Actors Fund has partnered with FreeWill to give you a free, easy way to write your will today. Making a will gives you peace of mind, knowing your future plans are in place and secure. To get started on your legacy today visit actorsfund.org/freewill.



August is Make-a-Will month,
visit actorsfund.org/freewill.

06 2021 Planned Giving PC
Chris Q. Sample
Company Name
123 Main Street Apt. A
Anytown, US 12345-6789

FREEWILL



A gift for you and your future

As a thank you for being a friend of Parkinson's Foundation, FreeWill is delighted to help you create your legal will. It's 100% free to you, and most people finish in 20 minutes or less. [If you are in California we also offer you the ability to make a free revocable living trust.](#)

Start my free will

Advanced Level:


Host a webinar for donors on estate planning

- Can be used as an incentive for upgrades!



0822_PC

NON PROFIT ORG US
POSTAGE
PAID
DOCTORS WITHOUT
BORDERS

 **MEDECINS SANS FRONTIERES**
DOCTORS WITHOUT BORDERS

40 Rector Street, 16th Floor
New York, NY 10006

Dear [Household Salutation],

Doctors Without Borders invites you to join us for a special conversation about how the climate emergency is affecting the communities we serve. From the Sahel and Horn of Africa to South Asia to Central America, we are providing medical care for people who are already suffering from the effects of climate change and environmental degradation. Our teams are responding to medical needs caused by cycles of drought, flooding, and extreme weather events. We are treating climate sensitive diseases such as malaria, dengue fever, and cholera. This year we are responding to a surge in malnutrition across multiple countries, with various political and economic issues compounded by environmental factors.

Please reach out to your dedicated Partner team with any questions at partners@newyork.msf.org or (646) 253-4540. Thank you!

Join us for this online event to learn more about MSF's evolving approach to planetary health, which recognizes that human health depends on the health of the planet.

Join us for a live online conversation:
September 22, 2022, at 1:00 – 1:45 PM EDT.

doctorswithoutborders.org/movingforward

[Household Addressee]
[Street Address Line 1]
[Street Address Line 2]
[City, State, Zip]

Advanced Level:

- Create your own complimentary Planning Guides
- Promote across multiple channels

Direct mail

Email

Digital / Print Advertising

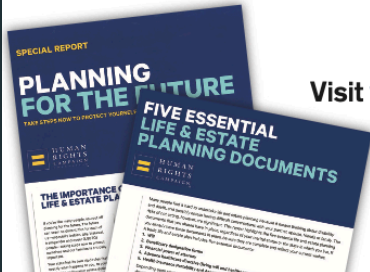
Social Media

Receive Complimentary Planning Guides

Let us know which of the following publications you would like to receive.

☐ **Planning for the Future Newsletter** for planning tips and timely planning news and information.

☐ **Five Essential Life & Estate Planning Documents** for those who want an easy-to-implement guide to the key plan elements you should have in place.



Visit www.myplanwithHRC.org for more information and download more free planning brochures today!



Data Strategy

OKAY, NOW WHO SHOULD I TARGET?



Different Approaches to Segmentation:

Standard Appeals or Renewals

- Common data segmentation is based on RFM:
 - Recency
 - Frequency
 - Monetary Values

Example:

Mailing 0-36 month donors
with a Most Recent Contribution
of \$5-\$4,999.99

Different Approaches to Segmentation:

Planned Giving

- Narrow down your universe to target donors who are **more committed to your mission**
 - Donors whose first gift was 10 years ago
 - Donors who have given 10, 20 or more gifts in their lifetime
 - Monthly Givers/Sustainers

Use The Tools You Have Available To You

- Wealth engine scores
- Planned giving scores
- Donors who have also engaged through events or online programs
- Donors who have asked for “more information”

The background is a dark teal color. There are six lighter teal, brushstroke-like shapes arranged in two columns of three on either side of the main title. The shapes are irregular and have a hand-painted appearance.

Moving Beyond The Will

EDUCATING DONORS THAT PLANNED GIVING
GOES BEYOND LEAVING YOU IN THEIR WILL

Encourage Giving Through Their Donor Advised Fund (DAF)



Salutation,
Do you have a Donor Advised Fund (DAF), or have you considered opening one?

A Donor Advised Fund is a giving vehicle administered by a charitable sponsor. A DAF — whether held at a national sponsor like Schwab or Fidelity, or a local community foundation — lets you make an irrevocable charitable contribution, receive an immediate tax deduction, and then recommend grants over time. Think of a DAF as a charitable checking account that gives you a tax break when the money is deposited, then lets you make donations to nonprofits over time.

Here are some ways you can support the work of the Human Rights Campaign Foundation through your DAF:

- ✓ Give your annual gift through your DAF
- ✓ Set up a recurring monthly gift through your DAF
- ✓ Name the Human Rights Campaign Foundation as a beneficiary of your DAF
- ✓ Take the #HalfMyDAF pledge and nominate the HRC Foundation for a matching grant before September 30

To make a grant from your DAF:

1. Go to HRC.im/DAF
2. Click on "Give Now From Your Donor Advised Fund" and enter the name of your DAF sponsor
3. Log in to your account and recommend a grant to the Human Rights Campaign Foundation, EIN #52-1481896

▼ HRC values your privacy — please detach here, tape closed and send back to HRC. ▼

PLEASE CONTACT ME:

- ☐ I am taking the **#HalfMyDAF** pledge and will be nominating the HRC Foundation for a matching grant!
- ☐ I'd like more information on giving through my DAF.
- ☐ Please send me instructions on how to name the HRC Foundation as a beneficiary of my DAF.
- ☐ I have already named the HRC Foundation as a beneficiary of my DAF. Please contact me to activate my Equality Circle membership!

Please verify your contact information and correct if necessary:

Salutation _____
123 Main Street _____
Apt. 1234 _____
Anycity, ST 12345-6789 _____ SOURCECODEIDNUMBER _____

I prefer to be contacted by:

☐ Phone (____) _____

☐ Email _____

Take the #HalfMyDAF Pledge

Your funding can have a bigger impact than ever with the **#HalfMyDAF** 2021 matching-grant challenge.

It's easy! When you pledge to grant half the money in your DAF before _____, you will have a _____ the HRC Foundation matching grant of \$100,000. You can nominate the HRC Foundation for a better our _____ 150 nonprofits.

To take the pledge and Foundation go to HRC.im/DAF

Did You Know?


You can support our mission for years to come. Simply name the Human Rights Campaign Foundation as a beneficiary of your DAF account, and the remaining assets (or a portion) of the account will be distributed to ensure the future of the fight for equality.

Sample DAF Beneficiary Designation

Legal name: The Human Rights Campaign Foundation
Address: 1640 Rhode Island Ave. N.W., Washington, D.C. 20036-3278
Federal Tax ID number: 52-1481896

The HRC Foundation touches every aspect of LGBTQ people's lives, changing hearts and minds on a local, national and global scale to make the institutions we depend on welcoming and inclusive.

Advance Equality with a Donor Advised Fund



HUMAN RIGHTS CAMPAIGN FOUNDATION

— Steve Lutz, HRC Equality Circle Member & DAF Donor

HOW TO BECOME A MEMBER OF THE EQUALITY CIRCLE

1. Include HRC in your will, trust, or beneficiary designation.
2. Notify us that you have left a legacy for equality in your plans.

EQUALITY CIRCLE
ENSURING THE FUTURE FOR LGBTQ EQUALITY
www.myplanwithHRC.org

Educate About Charitable Gift Annuities (CGAs)



CHARITABLE GIFT ANNUITY

Another way
to feed a
hungry child!

Visit
MyHeiferFoundationGiving.org/CGA
to learn more about the power
of a charitable gift annuity.



MAKE AN IMPACT TODAY!

Did you know that you can **make a gift to Heifer International** through a **charitable gift annuity**?

A charitable gift annuity allows you to give a generous gift to Heifer while receiving income for life. For more information on how to set up a charitable gift annuity to help families in need around the world, visit MyHeiferFoundationGiving.org/CGA.

To find out more about supporting the Heifer Foundation:

Email DEBBIE.MCCULLOUGH@HEIFERFOUNDATION.ORG

Call **501.907.4922**

Visit MyHeiferFoundationGiving.org/CGA



HEIFER GIFT ANNUITY RATES

| CURRENT AGE | RATE |
|-------------|------|
| 65 | 4.8% |
| 70 | 5.3% |
| 75 | 6% |
| 80 | 7% |
| 85 | 8.1% |
| 90 | 9.1% |

Rates are good as of July 1, 2022
and are based on a single file.

Encourage Bequests Through a “Challenge”



The Actors Fund,
for everyone
in entertainment.

The Actors Fund Bequest Challenge

Joy,

As we begin another new year, many of us are thinking of what we want to accomplish this year—and how we can make a positive impact on the world and the things that we value.

I'm sure that by now you've heard about [The Actors Fund Bequest Challenge](#). We are excited to announce that another generous friend of The Actors Fund has stepped up to add to Janice's Ellig's matching gift offer!

In addition to Janice's pledge to match 10% of your intended gift (up to \$25,000) until \$250,000, this new donor will now help your planned gift to go even further!

And while your gift is meant for the future, the matching gift donations can be used right away—making a philanthropic partnership that has both a long-term and an immediate impact on our community.

FIVE REASONS TO INCLUDE THE ACTORS FUND IN YOUR WILL

- 1 You'll leave a lasting legacy by enabling The Actors Fund to continue providing a safety net for performing arts and entertainment professionals.
- 2 You'll make a gift without using cash.
- 3 You'll make a gift that costs nothing during your lifetime.
- 4 You'll help your heirs by eliminating or reducing estate and capital gains taxes.
- 5 You'll be welcomed into our special Edwin Forrest Society.

Joy, there are so many good reasons to make a planned gift, and I encourage you to consider this exciting bequest challenge opportunity. It is a fantastic way to show your commitment to the performing arts and make a long-term impact!

Making a planned gift is also easy—as simple as adding a few short sentences to your will or insurance policy. When you take this action, [simply let us know](#) about your intended gift and we'll make sure it's included in Janice's special matching gift offer.

Plus Other Ways to Give

- Qualified Charitable Distribution from your IRA
- Gifts of Appreciated Securities (stocks, bonds, mutual funds)
- Gifts of Real Estate



The background is a solid dark blue color. Scattered across the surface are several teal-colored, hand-drawn style shapes. These shapes are mostly elongated, rounded rectangles or capsules, some oriented horizontally and others diagonally. They have soft, irregular edges, giving them a painterly or organic feel. There are approximately 10-12 such shapes distributed across the frame.

Pro Tips!

DO'S & DON'Ts

Do's & Don'ts

DO

Have a process in place to follow up on donors who "raise their hand"

DON'T

Remove legacy donors from direct mail campaigns

Do's & Don'ts

DO

Have a discussion with your caging company / gift processing team about data capture

DON'T

Don't forget that Planned Giving campaigns are an investment... just like acquisition

Do's & Don'ts

DO

Use wealth engine or planned giving scores to your advantage

DON'T

Let those scores be the deciding factor on who is likely to make a planned gift

Do's & Don'ts

DO

Use events – like *Make a Will Month*—to promote your Planned Giving program!

DON'T

Don't forget WIIFM (What's In It For Me?) when building a case of support for your donors

Remember These Dates:

August is National Make-a-Will Month

National Estate Planning Week is **October 17-23, 2023**

Do's & Don'ts

DO

Always include sample
bequest language and your
federal tax ID number

Do's & Don'ts

DO

Feel free to use a Legacy Society name or branding

DON'T

Get hung up if you don't have one!

Thank you!

MKosanovich@lautmandc.com

