

MARKETING CHARITABLE GIFT ANNUITIES

Nicole Engdahl & Meg Roberts
October 2014


Intro to Marketing CGAs

National Trends

- Economy
 - When stocks are up, so is the appeal of CGAs
- CDs
 - Still #1 financial plan
- Deferred Annuities
 - Increased interest amongst older donors
- Web
 - CGA sites are the most viewed web content

Intro to CGA Marketing

- CGAs are NOT bequests
 - More transactional
 - 40% of donors have more than one CGA
 - Many establish CGAs as an alternative to CDs
 - CGAs are a “gateway gift”




When to Market CGAs?

Month	Activity
April	Tax time! Donors just did their taxes and are already thinking of tax breaks for next year
October	Send renewal letters to current annuitants with an updated personalized illustration
November	Tax Time Again – market to anyone who has requested an illustration during the year and remind them of the Dec. 31 tax deadline
Other	<ul style="list-style-type: none"> • Year Round – if you can afford it, you never know when a CD will mature... • Good Economy – as the stock market increases, so do the number of CGAs... • ACGA Rate Changes

Where to Start?

- Keep it simple
 - Would you like to increase income?
 - Receive a tax donation?
 - AND support your favorite charity?



Evolution of the CGA Ad

- Having any ad is better than no ad

A National Geographic Society gift annuity provides a lifetime of support for you and a better world for them.

A Charitable Gift Annuity can provide you with tax savings and a fixed income for life. At the same time, your annuity helps fund groundbreaking field research and exploration, promote conservation and geography education and showcase people and cultures worldwide.

Age	Rate	Annual Income	Tax Deduction
65	6.0%	\$400	\$2,868.70
70	6.5%	\$450	\$3,400.70
80	8.0%	\$600	\$4,585.20
90	11.5%	\$1,150	\$5,556.80

Your continued support makes possible our ability to help you live a more stimulating life and leave a better world to those you love. For more information, please contact the Office of Gift Planning. Please call 800-226-4438 / 202-828-6485.

NATIONAL GEOGRAPHIC

Office of Gift Planning
1145 15th Street, NW
Washington, DC 20036-4438
gift@nationalgeographic.org

The NGS is a 501(c)(3) Organization.
* Government Exemption of 4%
Thank you for your continued support.

Evolution of the CGA Ad

- Having a donor-featured ad is better than a text-only ad

Give An Inspiring Gift

In 2007 Pat Menick, a professional artist, decided to establish a charitable gift annuity to support National Geographic. She now receives a guaranteed life income and is a direct part of the Society's efforts to inspire people to care about the planet.

"I feel good knowing that National Geographic is doing so much to protect endangered wildlife," says Pat. "The environmental problems we face are vast, but by joining with National Geographic and their history of remarkable accomplishments, I know we can pass on a more beautiful world!"

For more information about a charitable gift annuity or other ways to include National Geographic in your estate plans, please contact the Office of Estate Planning.

NATIONAL GEOGRAPHIC

Office of Estate Planning
1145 15th Street, NW
Washington, DC 20036-4438
800-226-4438
planning@nationalgeographic.org

Evolution of the CGA Ad

- Having a donor-featured ad with a reply/return is best
- Privacy is key

Support the Future

Pat and John Menick are proud to have established a charitable gift annuity with National Geographic. Their gift annuity provides them with steady tax savings and a fixed income for life. At the same time, their annuity helps fund groundbreaking field research and exploration, promote conservation and geography education and showcase people and cultures worldwide.

The Menicks are so pleased with their gift annuity which provides them with steady tax savings and a fixed income for life. At the same time, their annuity helps fund groundbreaking field research and exploration, promote conservation and geography education and showcase people and cultures worldwide.

For more information about a charitable gift annuity or other ways to include National Geographic in your estate plans, please contact the Office of Estate Planning.

Special Reply Slip for this benefit form is on the reverse side of this form.

April 1, 2014 - April 30, 2014

NATIONAL GEOGRAPHIC

Office of Estate Planning
1145 15th Street, NW
Washington, DC 20036-4438
800-226-4438
planning@nationalgeographic.org

To MAKE YOUR REQUEST to National Geographic, please use the following language: "I have been assigned to support National Geographic in my will. I would like to request that you include National Geographic in my will." Thank you for your continued support.

Best Practices

Know Your Audience

- Look at CGA donors in several slices:
 - Nationally
 - Peak marketing age 75-79
 - Similar Institutions
 - For Your Institution Specifically
 - What is your average CGA range?
- Use ACGA's Survey Results



Know Your Audience

- Demographics of CGA donors
 - Age (use range of 5 years)
 - Gender
 - Family status (single, widowed, coupled, gay)
 - Stakeholders or other Volunteers



Ask Questions

- Do you have a CD? Are you happy with your rate?
- Are you worried about taxes on appreciated assets?
- Nervous about your income 5-10 years from now?
- Single, widowed, partnered?



Target Your Efforts

- Use Your Audience Demographics and Goals to Target Your Efforts
 - Feature an existing donor who is most similar to the audience you want to reach
 - Wide-reach vs. More Targeted vs. Most Targeted



Target Your Efforts

Provide For Your Future And For GW's, Too

Income for Life
 Send information on a GW Charitable Gift Annuity

Birthdate(s): _____

Amount: \$25,000 \$100,000
 \$50,000 \$ _____

I want to know more about gifts to GW that provide me with income for life.
 Send information about including GW in my will.
 I have already included GW in my will.

Name: _____

Address: _____

Phone: _____

Office of Planned Giving
 2100 M Street, SW, Suite 110
 Washington, DC, 20037

Target Your Efforts

30-Second Survey

Her Hope: A GW Education
 Your Reward: Fixed Payments for Life

Reap the Benefits of a GW Gift Annuity

Learn More About a Win-Win Donation

See How You Benefit

Target Your Efforts

Gift Annuity Review

Corporate Trust Investments Portfolio (FY 2007)

Responses

- How do I want them to respond?
 - Include a reply device (avoid postcard responses)
 - Prominently provide other ways to contact you
 - Send them online (back to privacy)
 - Track your success



Responses - Mail

Let us help you provide for your future and create a legacy for the natural world.

Simply fill out and mail this response card for a customized proposal relevant to your situation. For faster service, please call our experienced team of gift planners toll-free at (877) 812-2688, email legacy@tna.org or visit naturnature.org/legacycenter.

For more information about life income gifts with The Nature Conservancy, please provide the following information: (The information you give will be kept confidential and used only for your personalized proposal.)

I'm considering a gift of \$ _____ funded with:

Cash Stock Real Estate

(\$5,000 minimum for cash or securities for a gift annuity; \$10,000 minimum for cash or securities for a charitable remainder trust; \$100,000 minimum for real estate)

Beneficiary's birth date(s): _____

month/day/year month/day/year

I would like information about deferring income payments.

I have included The Nature Conservancy in my estate plans.

Yes, I would like to receive periodic email updates from The Nature Conservancy. (We respect your privacy and will never share your email address.)

Name: _____

Phone: _____

Best time to call: _____ a.m./p.m.

Email: _____

Source Code: _____

Account ID: _____

Safe: **FPO**

Salutation Line 2 _____

Salutation Line 3 _____

The Nature Conservancy
 Helping Nature. Preserving Life.
 Toll-free: (877) 812-2688
 Email: legacy@tna.org
 Web: naturnature.org/legacycenter

Responses - Online

Special Olympics
 4000 Reservoir Road
 Silver Spring, MD 20910

Dear (Name, Title):

P.S. Please use the enclosed reply to request a free charitable gift annuity personalized illustration. Or, if you prefer to download charitable gift annuity materials directly to your computer, go to www.SpecialOlympics.org/annuity. Thank you for your support!

The enclosed illustration demonstrates how a charitable gift annuity might work for you. Whether you are interested in the illustration, or the illustration, capital gains could be lost. Please use the enclosed reply to request a free charitable gift annuity personalized illustration. Or, if you prefer to download charitable gift annuity materials directly to your computer, go to www.SpecialOlympics.org/annuity. Thank you for your support!

Please use the enclosed reply to request a free charitable gift annuity personalized illustration. Or, if you prefer to download charitable gift annuity materials directly to your computer, go to www.SpecialOlympics.org/annuity. Thank you for your support!

Special Olympics
 4000 Reservoir Road
 Silver Spring, MD 20910

Manage Expectations

- CGAs don't appeal to as wide a range of people as annual fund gifts or even bequests
- Expect lower response rates from print marketing
- Expect donors to do more research online



Manage Expectations

- Goal of **marketing** is to start the conversation, not close the gift – each lead is valuable. These are all major gift prospects.



MARKETING CHARITABLE GIFT ANNUITIES (PART 2)

Nicole Engdahl & Meg Roberts
 October 2014

What Works?



What Does Not Work

- Oversharing - - too much copy
- Small font
- Bad photos (hazy, busy, bad lighting, unflattering)
- Promoting legacy club/society as motivator
- Promises of "guaranteed" income
- Sounding like a financial institution




How Did It Do?



Make an Informed Decision.

1.00%
Stock Market Fund

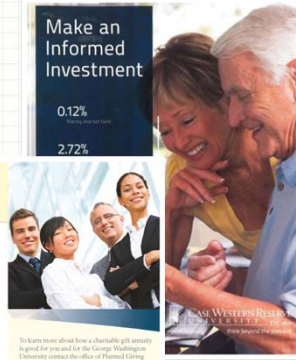
1.95%
5 Year T-Bill

5.8%
5 Year T-Bill (with 10% expense ratio)

Make an Informed Investment

0.12%
Investment Fund

2.72%
Investment Fund



go.gwu.edu/planningdng




Create income for today

... leave a legacy for tomorrow.


By making a life-income gift with The Nature Conservancy, you can help protect our planet's natural resources while providing you with lifetime income for life. You may also receive significant tax benefits. The gift of your gift will help ensure our natural world will be preserved for future generations.

For more information on a potential program, contact us, and we'll help you understand the benefits of a life-income gift.

Send us your contact information and we'll contact you with more information.

Age	Rate	Assess	No. Payments
50	5.0%	\$100,000	\$2,000
60	5.0%	\$100,000	\$2,000
70	5.0%	\$100,000	\$2,000
80	5.0%	\$100,000	\$2,000

The Nature Conservancy
Protecting the Planet. Inspiring the People.



Puzzled by Gift Annuities?

Discover the Benefits:

LIFETIME TAX-FREE INCOME LEGACY SUPPORT COLONIAL FUTURE ANNUITY

H L F U T U R E S S
D E Y F A L L H B O
S G O A X I C X I T
U A F N F O W N C
P C E N R E L E C V
P Y O U E T O J O U
O M J I E I N H M Y
R V Z T M I N E I
T Z C Y S E A E L
U M R U W Q L S Q U

Income for Life!

I need information on a GW Charitable Gift Annuity

I want to know more about gifts to GW that provide me with income for life.

I need information about including GW in my will.

I have already included GW in my will.

Name: _____

Address: _____

Phone: _____

E-mail: _____

Send

Single Annuity	Rate	Two Annuities	Rate
50	5.0%	65.0%	5.0%
70	5.0%	75.75%	5.0%
80	5.0%	85.85%	5.0%
90	5.0%	95.05%	5.0%

For more information, including a personalized illustration, please contact:

The George Washington University
Office of Planned Giving
1100 M Street, NE, Suite 310
Washington, DC 20037
Tel: 202-773-6777 ext. 7134
planning@tcw.org

