

**LAUNCHING YOUR
PLANNED GIVING PROGRAM**

May 25, 2017

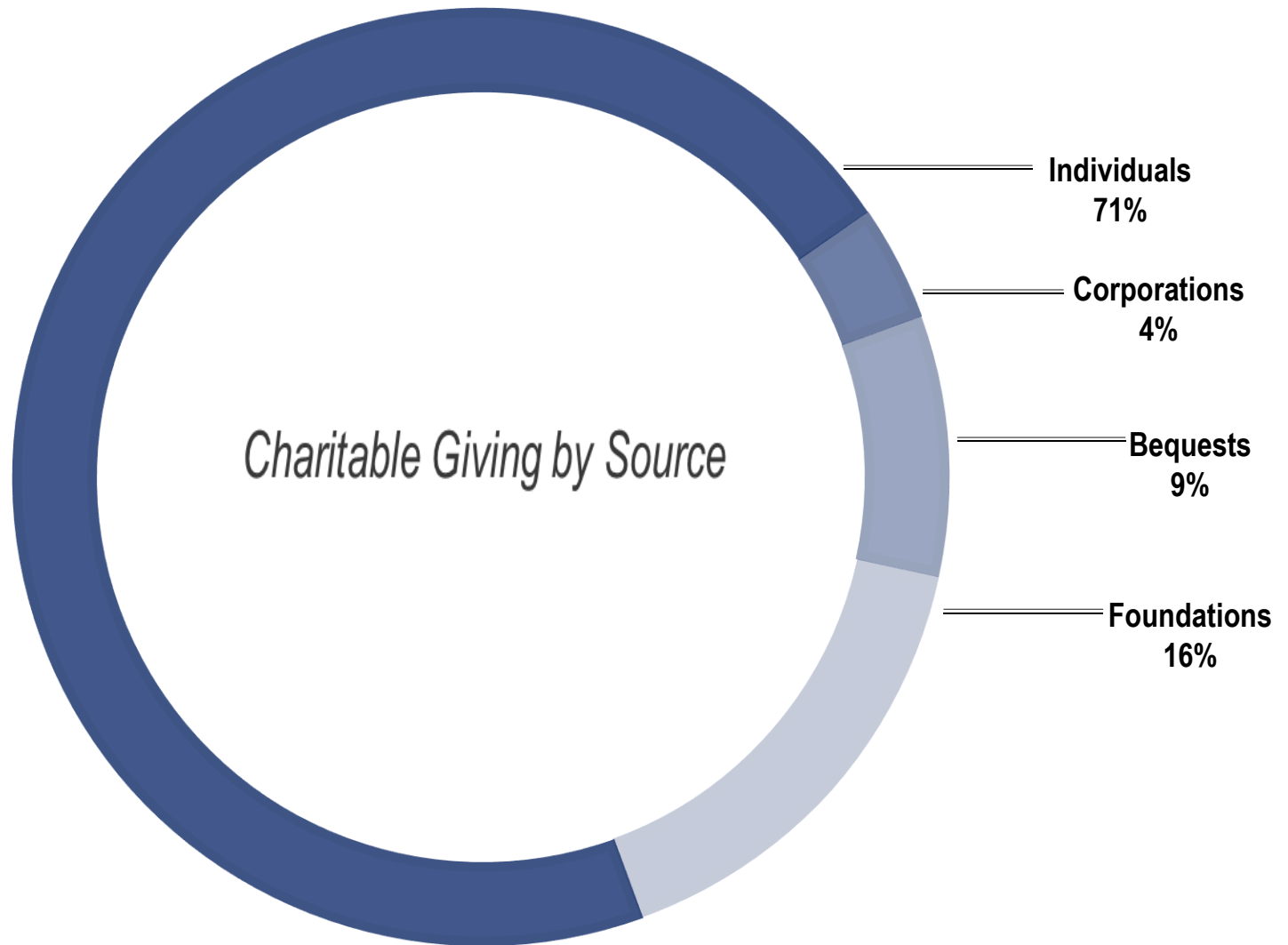
**National Capital Gift Planning Council
“25th Planned Giving Days”**

Valeria Lassiter, CEO

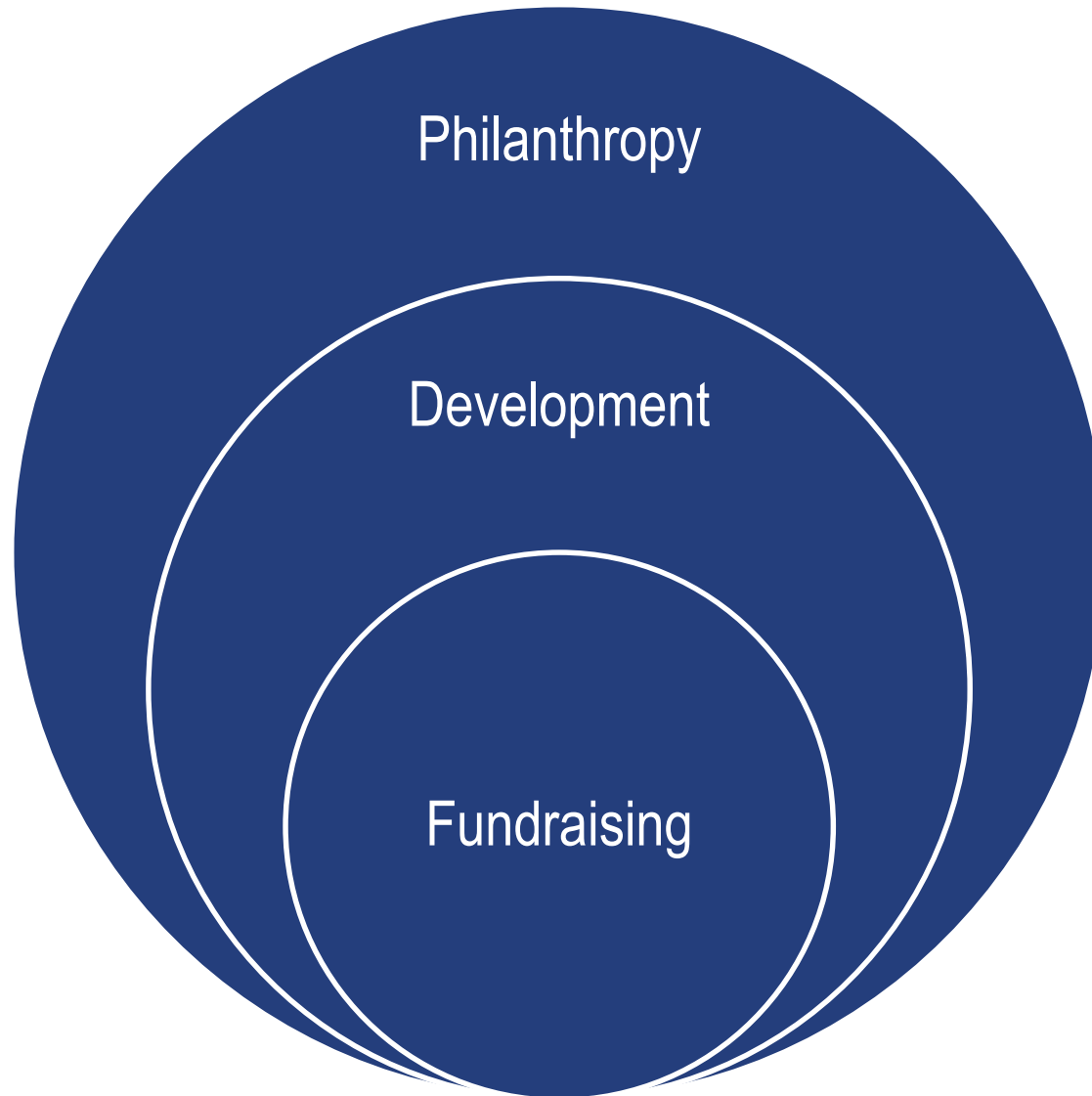
Lassiter & Associates

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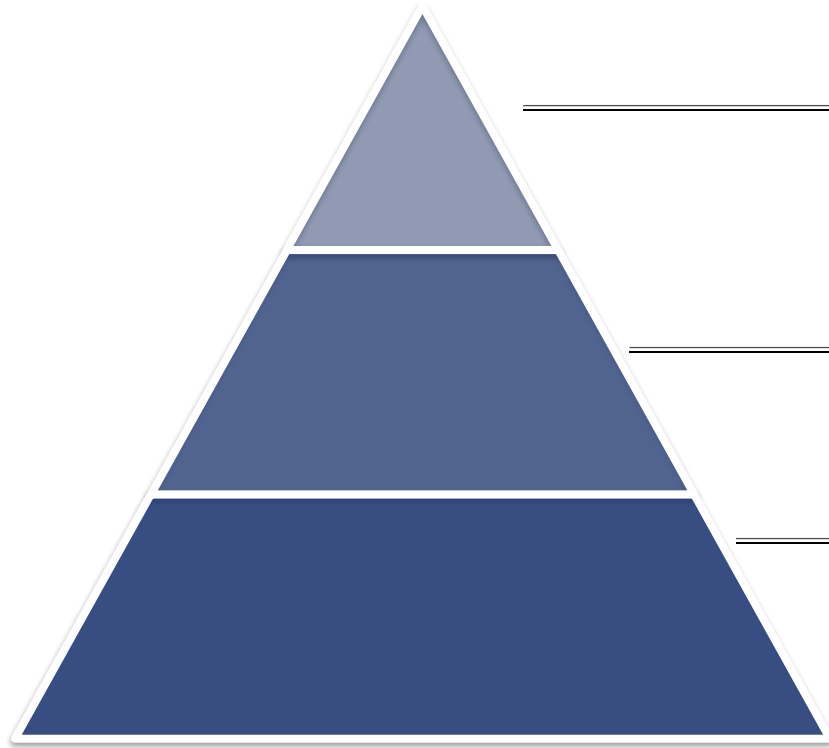
GIVING USA 2015



CULTURE OF PHILANTHROPY



STRUCTURED FOR SUCCESS



Estate Planning

Bequests, Planned Gifts (Individuals)

Major Giving

Capital, Endowment, Special Campaigns (Individuals, Corporations, Foundations)

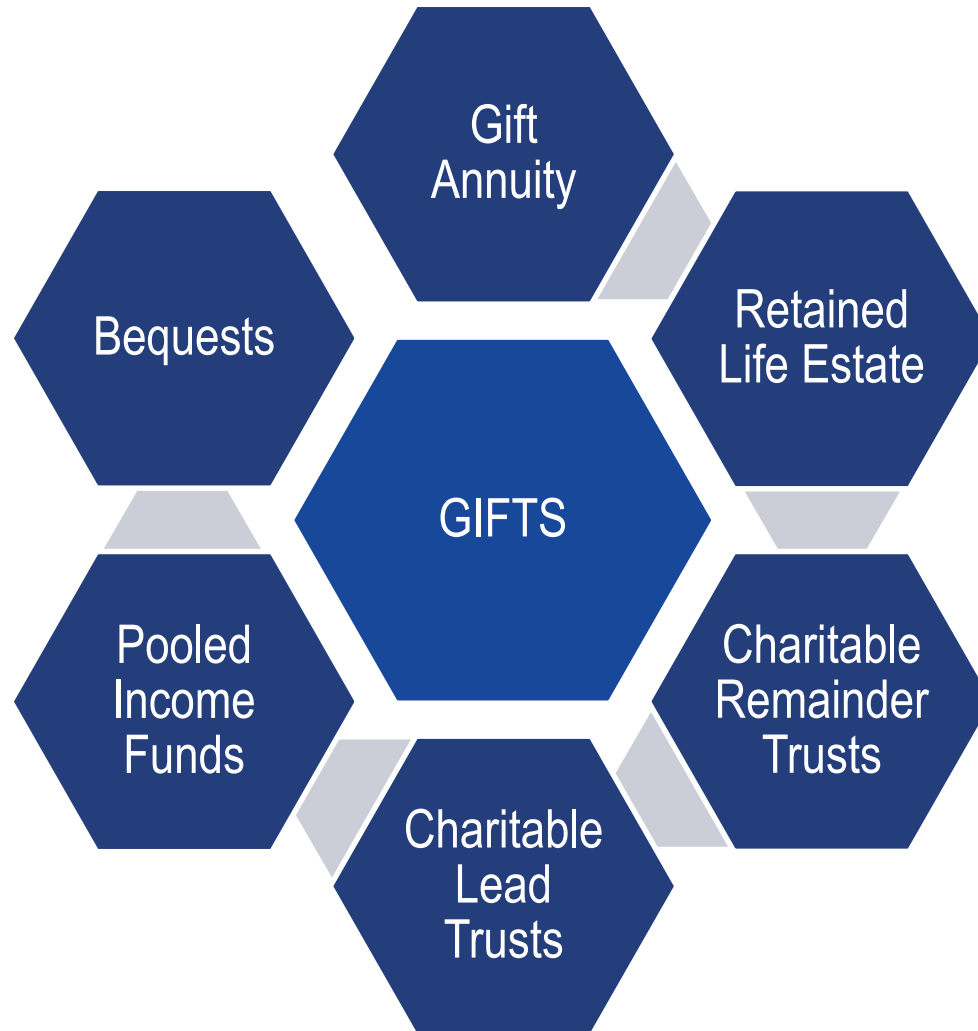
Annual Giving

Appeals, Special Events, Sponsorships, Memberships and Clubs, Direct mail, Acquisitions, renewal Programs, Online, Federated Campaigns (Individuals, Corporations, Foundations)

PLANNED GIVING

“Planned Giving” is the act of making a commitment to give a charitable organization a major gift, over time or at death, as part of the donor’s overall financial and estate planning.

TYPES OF PLANNED GIFTS



Planned gifts allow your organization to plan for future growth and strength – sustaining programs and facilities, building capacity, and establishing endowments.

**The planned giving acquisition process is
by no means a race.**

STEP 1: Assess Your Internal Readiness

INTERNAL READINESS

Are you ready for planned giving?

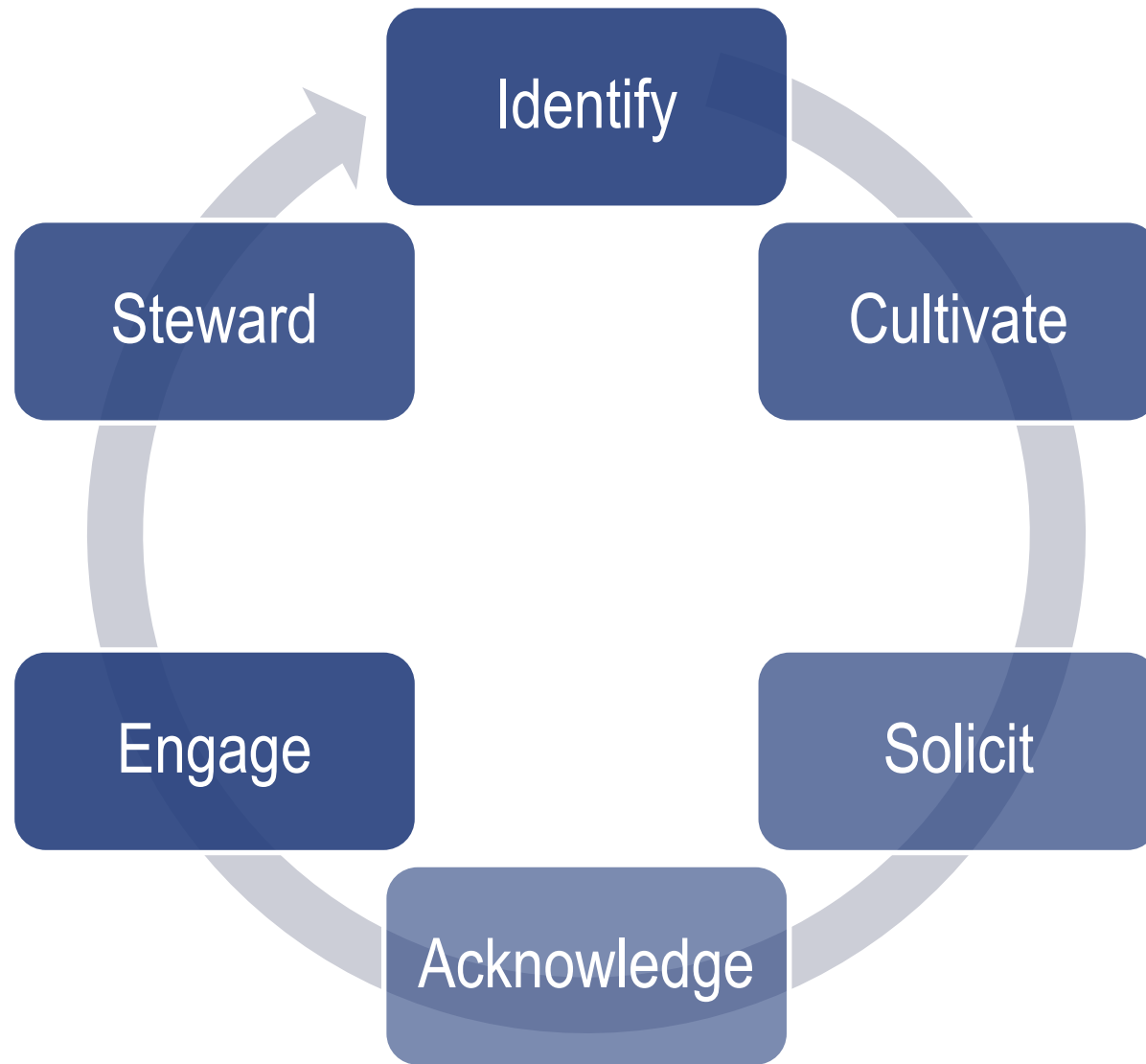
1. Gift Acceptance Policy
2. Gift Acknowledgement and Receipting Process
3. Stock Brokerage Account
4. Legacy-level Stewardship
5. Endowment Framework
6. Constituent Diversity
7. Relationship with Estate Attorneys and Personal Representatives
8. Board & Volunteer Leadership

STEP 2: EDUCATE, MARKET & CULTIVATE YOUR CONSTITUENTS

STEP 3: YOUR FUNDRAISING PLAN OF ACTION

THE DONOR LIFE CYCLE

Integrating planned giving and annual giving



PROSPECTING & DATA MINING



STEP 4: RECOGNIZE

STEP 5: ANALYZE

QUESTIONS

Valeria Lassiter, CEO



Valeria Lassiter, President & CEO

Valeria Lassiter has more than 25 years of experience in nonprofit development and fundraising. She is known in the industry as a top results oriented strategist who designs and manages development plans that advance relationships and grow revenue for nonprofits. She has applied her analytical skills and considerable energies to campaigns ranging from \$100,000 to \$32 million.

She also has worked in public affairs and community-based organizations and in corporate philanthropy for a Fortune 500 company. Since 2013, Valeria has served as lead instructor for resource development with the Georgetown University Executive Nonprofit Management Certificate Program. Valeria has trained over 1,000 nonprofit leaders and boards in philanthropy, development and fundraising.

She holds a bachelor's degree in communications from East Carolina University and a master's of divinity from Colgate Rochester Divinity School. Valeria is currently completing her MBA from Babson College. She is a member of the Board of Directors for the National Education Association (NEA) Foundation and a member of East Carolina University Foundation Board of Directors.

Thank you for providing Lassiter & Associates
with this extraordinary opportunity.

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