Debunking
4 Common Myths
Natural Marketing Institute’s Healthy Aging Database® Study

**METHODOLOGY**

- Annual quantitative study since 2005, now with 11 years of trended data
- June 2017 research of U.S. adults comprised of:
  - 3,465 general population sample
    - 38% Millennials
    - 20% Gen X
    - 34% Boomers
    - 7% Matures
- Balanced to U.S. Census data across key demographics:
  - Gender, age, income, education, region and race
- Statistically significant at the 95% confidence level to +/- 1.5%
- Conducted via online research methodology

**References**

- Gonser Gerber Tinker Sturh (2009)
- Stanford Social Innovation Review (Winter 2013)
- National Institute on Aging, Health and Retirement Study (2015)
- Philanthropy 100 Performance Benchmarking Initiative
Myth #1

Don’t Waste Your Time On Donors Younger Than 65
Generation Descriptions

**Millennials**
Born 1977-1998
Ages 19-39

**Gen X**
Born 1965-1976
Ages 40-51

**Boomers**
Born 1946-1964
Ages 52-70

**Matures**
Born 1900-1945
Ages 71+
Giving By Generations

Donating Behavior Varies by Age

<table>
<thead>
<tr>
<th></th>
<th>Arts &amp; Culture</th>
<th>Education</th>
<th>Secondary Education</th>
<th>Environmental/Animal Welfare</th>
<th>Faith Based</th>
<th>Healthcare</th>
<th>Human Services</th>
<th>International Affairs</th>
<th>Medical Research</th>
<th>Public/Society Benefit</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Millennials</strong> 38.5%</td>
<td>110</td>
<td>115</td>
<td>112</td>
<td>97</td>
<td>89</td>
<td>98</td>
<td>79</td>
<td>112</td>
<td>82</td>
<td>140</td>
</tr>
<tr>
<td><strong>Gen X</strong> 19.8%</td>
<td>77</td>
<td>89</td>
<td>140</td>
<td>93</td>
<td>84</td>
<td>104</td>
<td>109</td>
<td>83</td>
<td>97</td>
<td>86</td>
</tr>
<tr>
<td><strong>Boomers</strong> 34.6%</td>
<td>92</td>
<td>80</td>
<td>65</td>
<td>107</td>
<td>112</td>
<td>95</td>
<td>109</td>
<td>94</td>
<td>108</td>
<td>68</td>
</tr>
<tr>
<td><strong>Matures</strong> 7.1%</td>
<td>150</td>
<td>146</td>
<td>93</td>
<td>104</td>
<td>143</td>
<td>121</td>
<td>143</td>
<td>113</td>
<td>164</td>
<td>77</td>
</tr>
</tbody>
</table>

High

Low
Importance/Prevalence of Estate Planning Documents

**Millennials**
Ages 19-39
- 33% Very Important
- 18% Have a Will
- 52% Have None

**Gen X**
Ages 40-51
- 42% Very Important
- 28% Have a Will
- 43% Have None

**Boomers**
Ages 52-70
- 49% Very Important
- 44% Have a Will
- 29% Have None

**Matures**
Ages 71+
- 64% Very Important
- 68% Have a Will
- 14% Have None
Dear [Name],

As a loyal friend of Easter Seals, you have helped to make a profound difference in the lives of people with disabilities, opening new pathways to opportunity. Disability is a part of life and something that we will all experience at some point in our lives.

Creating a plan that prepares for the future is not only the best way to protect your family, but it can also pave the way for people facing today’s disabilities.

To make the planning process easier for you, we’ve developed the Personal Estate Planning Kit. This complimentary home-study course is your one-stop guide for creating plans that protect your family’s future and invest in the causes that are important to you, including Easter Seals.

Achieve the peace of mind that comes from being prepared:

**download my kit**

By developing estate plans that account for your family’s unique circumstances, you can ensure that your legacy endures for years to come and protects the people and causes you care about most. Thank you for your unwavering support and partnership as we support individuals and families living with disabilities.

Sincerely,

Mary R. Mucci
Senior Director, Planned Giving
800.221.6827 ext. 7240
giftplanning@easterseals.com

---

**Personal Estate Planning Kit Download**

Save time, protect assets and avoid distress with a well-planned estate.

This comprehensive estate planning kit includes a 23-page Lesson Book and an Electronic Record Book:

1. Download the lesson book (PDF), which will walk you through five essential lessons on creating an effective estate plan. Each lesson includes a multiple-choice quiz to test your knowledge of the information covered.

2. After completing the lesson book, you’ll be ready to take inventory of your assets. Download the record book (PDF) to begin.

Note: To record your information digitally on the form, you must have Adobe Reader. Download it for FREE here. If you’re using Firefox (browser), you must save the PDF prior to making edits.

**Need Help?**

If we can provide any assistance during your planning process, please contact the Easter Seals Gift Planning Team at 800-221-6827, ext. 7240 or giftplanning@easterseals.com.
## Estate Planning Documents Prevalence

<table>
<thead>
<tr>
<th>Have a Will</th>
<th>Total GP</th>
<th>Millennials</th>
<th>Gen X</th>
<th>Boomers</th>
<th>Matures</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>33%</td>
<td>18%</td>
<td>28%</td>
<td>44%</td>
<td>68%</td>
</tr>
<tr>
<td>Have a living trust</td>
<td>17%</td>
<td>12%</td>
<td>12%</td>
<td>21%</td>
<td>33%</td>
</tr>
<tr>
<td>Have joint ownership of property that passes to the surviving owner</td>
<td>26%</td>
<td>14%</td>
<td>23%</td>
<td>36%</td>
<td>48%</td>
</tr>
<tr>
<td>Have a beneficiary designation on an IRA 401(k) or other retirement account</td>
<td>32%</td>
<td>21%</td>
<td>32%</td>
<td>39%</td>
<td>47%</td>
</tr>
<tr>
<td>Transfer on death (TOD) designation on a bank account, investment account or real estate</td>
<td>14%</td>
<td>8%</td>
<td>12%</td>
<td>19%</td>
<td>27%</td>
</tr>
<tr>
<td>None</td>
<td>40%</td>
<td>52%</td>
<td>43%</td>
<td>29%</td>
<td>14%</td>
</tr>
</tbody>
</table>
Planned Giving Considerations:
Q: If you were to consider leaving a gift to a charity in your will, which of the following would you be likely to do?

**Millennials**
Ages 19-39
- 20% 100% to One Org.
- 54% Split Gifts
- 26% Would Not Give

**Gen X**
Ages 40-51
- 15% 100% to One Org.
- 47% Split Gifts
- 38% Would Not Give

**Boomers**
Ages 52-70
- 13% 100% to One Org.
- 39% Split Gifts
- 48% Would Not Give

**Matures**
Ages 71+
- 13% 100% to One Org.
- 33% Split Gifts
- 54% Would Not Give
**Gift Intention:**

Q: Of those who would split gifts, if you were to sign a will in the next 6 months, how many charitable organizations would you be likely to include?

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Millennials</th>
<th>Gen X</th>
<th>Boomers</th>
<th>Matures</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ages 19-39</td>
<td>20% One 42% Two 29% Three 9% &gt;Three</td>
<td>19% One 45% Two 27% Three 9% &gt;Three</td>
<td>19% One 39% Two 30% Three 12% &gt;Three</td>
<td>4% One 51% Two 32% Three 13% &gt;Three</td>
</tr>
</tbody>
</table>
## Interest in Issues Related to Charitable/Planned Giving

<table>
<thead>
<tr>
<th>Activity</th>
<th>Millennials</th>
<th>Gen X</th>
<th>Boomers</th>
<th>Matures</th>
</tr>
</thead>
<tbody>
<tr>
<td>Honoring a family member by making a tribute gift</td>
<td>27.5%</td>
<td>21.8%</td>
<td>14.1%</td>
<td>9.6%</td>
</tr>
<tr>
<td>Charitable Gift Annuity</td>
<td>17.2%</td>
<td>14.7%</td>
<td>7.7%</td>
<td>3.1%</td>
</tr>
<tr>
<td>Charitable Remainder Trust</td>
<td>13.2%</td>
<td>14.1%</td>
<td>6.1%</td>
<td>3.1%</td>
</tr>
<tr>
<td>Immediate tax deduction in exchange for the right to inherit your home</td>
<td>13%</td>
<td>11%</td>
<td>5.4%</td>
<td>6%</td>
</tr>
<tr>
<td>(or other land) at the end of your life</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Saving capital gains taxes by making a gift of stocks or bonds to a charity</td>
<td>12.1%</td>
<td>10.1%</td>
<td>4.2%</td>
<td>4.5%</td>
</tr>
</tbody>
</table>
FAST FEEDBACK

Please complete and return today. Thank you!

I have included the Symphony as a beneficiary in my will or other estate plans and am interested in being included in the 70X70 Bequest Campaign.

I am interested in learning more about including the San Francisco Symphony as a beneficiary in my estate plans.

I would like to receive a copy of the FREE brochure Your Personal Guide to Gift Planning.

I have enclosed $____________ to support the Symphony today.

Thank you for supporting symphonic music in the Bay Area!

Name—Please print.

Telephone  Email

Address

City, State ZIP

We respect your privacy! Information collected here will be kept strictly confidential. It will not be sold, rented, loaned or otherwise disclosed, and it will not be used in ways to which you have not consented.
June 2015

Dear Friend,

Over the course of my last and 15th year as president, I have been giving thought to the legacy I will leave at Adelphi. It is my honor to include Adelphi in my estate plans, and to give back to the University that has given so much to me. Have you thought about the legacy you might leave at Adelphi?

If you had a professor at Adelphi, name and tenure, your legacy behind.

If you received a generous scholarship, Adelphi degree, your legacy behind.

If you boldly and proudly represented the university, or organization that broadened your perspective, your legacy behind.

If you were a student leader who served the students and faculty, your legacy behind.

If you found your passion at Adelphi, your legacy belongs here.

When you reflect on your years at Adelphi, the experiences you enjoyed, the values you received, and the friends you made, your legacy belongs here.

Today I ask you to join me as a member of the Ruth S. Harley Society.

Your legacy belongs here.

Sincerely,

Dr. Robert A. Scott
President of Adelphi University

Member of the Ruth S. Harley Society since 2005

Ruth S. Harley SOCIETY

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### Donors Like to Keep It Close to Home

% donors indicating which type of organization they prefer to donate to

<table>
<thead>
<tr>
<th></th>
<th>Local</th>
<th>National</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>Donors</td>
<td>60%</td>
<td>30%</td>
<td>10%</td>
</tr>
<tr>
<td>Millennials</td>
<td>50%</td>
<td>31%</td>
<td>19%</td>
</tr>
<tr>
<td>Gen X</td>
<td>60%</td>
<td>30%</td>
<td>11%</td>
</tr>
<tr>
<td>Boomers</td>
<td>66%</td>
<td>29%</td>
<td>5%</td>
</tr>
<tr>
<td>Matures</td>
<td>63%</td>
<td>30%</td>
<td>6%</td>
</tr>
<tr>
<td>Frequent Donators</td>
<td>61%</td>
<td>27%</td>
<td>12%</td>
</tr>
<tr>
<td>Infrequent Donators</td>
<td>58%</td>
<td>33%</td>
<td>9%</td>
</tr>
<tr>
<td>White</td>
<td>62%</td>
<td>29%</td>
<td>9%</td>
</tr>
<tr>
<td>Black/AA</td>
<td>51%</td>
<td>34%</td>
<td>15%</td>
</tr>
<tr>
<td>Asian</td>
<td>49%</td>
<td>28%</td>
<td>23%</td>
</tr>
<tr>
<td>Hispanic</td>
<td>53%</td>
<td>26%</td>
<td>21%</td>
</tr>
<tr>
<td>&lt;$800K</td>
<td>60%</td>
<td>29%</td>
<td>10%</td>
</tr>
<tr>
<td>$500K-$2M</td>
<td>67%</td>
<td>27%</td>
<td>6%</td>
</tr>
<tr>
<td>&gt;$2M</td>
<td>54%</td>
<td>35%</td>
<td>11%</td>
</tr>
</tbody>
</table>

Gray boxes highlight the groups which are high across the types of preferred organizations.
Dear [Salutation],

The holidays are quickly approaching, the season when families gather and children dream big. For many people living in America, it’s a time of abundance—it’s also a time of waste. During the holidays and year-round, an enormous amount of food is wasted in the United States. The food supply chain, including [number of food insecure persons] who do not realize it, you likely know someone who doesn’t have enough.

You can help. This holiday season, give a gift from your will to Feeding America®.

At Feeding America, we’re working hard to end hunger—in [state] and throughout the country. But a hunger-free America won’t happen overnight. That’s why I’m asking you to make a powerful, long-term commitment to bring nutritious food to people in need. Your future gift will fortify a network of more than 200 foodbanks. And you’ll advance our food rescue program, which puts nutritious food destined for waste into the hands of people facing hunger.

I hope you enjoy the enclosed issue of Fighting Hunger Today and Tomorrow, which shows how you can help lift the burden of hunger for future generations.

Thank you for all that you do for Feeding America. You make our work possible.

Sincerely,

Jessica Noe
Senior Manager, Development and Planned Giving

P.S. Do you know someone who feels passionate about ending hunger in America? Honor them with a gift from your will. Learn more in our free guide, Give From the Heart With a Tribute Gift. Simply return the enclosed reply card today!

---

- Personalized salutation
- Number of food insecure people
- State specific statistics
- State personalization
Feed the Next Generation in Pike County

Dear Julie,

Thanks to you, the Southeastern Ohio Food Bank served more than 17,000 people in your neighborhood.

Unfortunately, there’s much more to be done, and we need your help to ensure we can be there to feed families in Pike County who are struggling.

In this issue of our newsletter, you’ll learn about one of the simplest ways to extend your support into the future. A gift in your will or living trust is a flexible way to help continue the fight to end hunger in Pike County.

Thank you for all you do to support the Southeastern Ohio Food Bank. Together we can improve the lives of Ohioans by ending hunger.

Sincerely,

Mary Anderson
Planned Giving Officer

P.S. Return the enclosed survey to learn more about how you can help ensure that children in Pike County don’t go to school hungry.

Feed the Next Generation in Ross County

Dear Douglas,

Thanks to you, the Southeastern Ohio Food Bank served more than 20,000 people in your neighborhood.

Unfortunately, there’s much more to be done, and we need your help to ensure we can be there to feed families in Ross County who are struggling.

In this issue of our newsletter, you’ll learn about one of the simplest ways to extend your support into the future. A gift in your will or living trust is a flexible way to help continue the fight to end hunger in Ross County.

Thank you for all you do to support the Southeastern Ohio Food Bank. Together we can improve the lives of Ohioans by ending hunger.

Sincerely,

Mary Anderson
Planned Giving Officer

P.S. Return the enclosed survey to learn more about how you can help ensure that children in Ross County don’t go to school hungry.

Feed the Next Generation in Jackson County

Dear Eric,

Thanks to you, the Southeastern Ohio Food Bank served more than 17,000 people in your neighborhood.

Unfortunately, there’s much more to be done, and we need your help to ensure we can be there to feed families in Jackson County who are struggling.

In this issue of our newsletter, you’ll learn about one of the simplest ways to extend your support into the future. A gift in your will or living trust is a flexible way to help continue the fight to end hunger in Jackson County.

Thank you for all you do to support the Southeastern Ohio Food Bank. Together we can improve the lives of Ohioans by ending hunger.

Sincerely,

Mary Anderson
Planned Giving Officer

P.S. Return the enclosed survey to learn more about how you can help ensure that children in Jackson County don’t go to school hungry.

25,000 people in Jackson County don’t have enough food to eat.

3 million meals missed by hungry families in the region.

10,000 OF THOSE ARE CHILDREN.
QuICk FACTs ABouT ouR Y

ouR CAuse
The YMCA of the Greater Twin Cities is a cause-driven organization that works toward strengthening our community through:

• **Youth Development.** We encourage and nurture the potential of all the youth we serve.

• **Healthy Living.** We improve the health and well-being of individuals and families throughout our community.

• **Social Responsibility.** We give back and provide support to our neighbors.

ouR IMPACT

• We are one of Minnesota’s largest nonprofits, employing more than 4,500 people.

• We offer $7 million in annual scholarships, helping more than 40,000 people.

• Our camps are a place to grow for more than 25,000 young people each year.

• Our youth development programs build leadership skills and values in more than 10,000 youth.

• We are a premier resource for healthy living for more than 150,000 members.

• Our Youth Intervention Services offers hope and help to 2,000 challenged or displaced teens.
“I am Comfortable Using New Technologies and Devices.”

<table>
<thead>
<tr>
<th>Year</th>
<th>General Population</th>
<th>Millennials</th>
<th>Gen X</th>
<th>Boomers</th>
<th>Matures</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>90%</td>
<td>90%</td>
<td>91%</td>
<td>90%</td>
<td>85%</td>
</tr>
<tr>
<td>2015</td>
<td>81.4%</td>
<td>91.3%</td>
<td>85.4%</td>
<td>73%</td>
<td>66.8%</td>
</tr>
</tbody>
</table>
Which of the Following Activities Do You Participate in on a Regular Basis? “Surfing the Internet”

- General Population: 75%
- Millennials: 74%
- Gen X: 80%
- Boomers: 75%
- Matures: 67%
YOUR GIFT MATTERS

You Can Impact Future Generations

Generosity comes in many forms, and it's often the best way for you to support important causes that matter the most to you in your life. When you give to Webb School of Knoxville, you help us make a difference.

Start here by learning the different gift options available to you. We will work with you to find a charitable plan that lets you provide for your family and support Webb School of Knoxville.

DISCOVER WAYS TO GIVE

Take a look at the different options that you think may work best.

GIVING AMOUNT

AGE

ASSETS
Generosity comes in many forms, and it's often the best way for you to support important causes that matter the most to you in your life. When you give to Webb School of Knoxville, you help us make a difference.

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DISCOVER WAYS TO GIVE
Take a look at the different options that you think may work best.

GIVING AMOUNT
AGE
ASSETS

Not sure where to get started?
To get started, consider how you want to plan your gift.

What's New?
Make a Tax-Free Gift With An IRA Retirement Plan Check Up Tips
Honor Someone with a Gift

View All Articles

9800 Webb School Drive, Knoxville, TN 37923

The information on this website is not intended as legal or tax advice. For such advice, please consult an attorney or tax advisor. Figures cited in examples are for hypothetical purposes only and are subject to change. References to rates and income items include federally funded rates only. State income estate taxes or state tax may impact your results.
Deepen Your Connections

Your Gift Brings You Closer

You want to leave money to Webb School of Knoxville in your will. You also want the flexibility to change your will in the event that life circumstances change. You can do both.

In as little as one sentence, you can complete your gift. This type of donation to Webb School of Knoxville in your will or living trust, helps ensure that we continue our mission for years to come.

An Example of How It Works

Meet Tom and Martha. When they got married and created a will, they included a $75,000 gift to Webb School of Knoxville. As the family grew to include three children, Tom and Martha decided to revise their gift to ensure their children's future financial security.

They met with their attorney and revised the gift language so that Webb School of Knoxville received a percentage of their estate, instead of a specific amount. Tom and Martha now rest easy knowing their plans will provide for the people and charitable work they love.
Fund Your Donation With:

- Cash
- Real Estate
- Closely Held Stock
- Appreciated Securities
- Tangible Personal Property

Next Steps

1. Contact Jay Howard CFRE at 865-291-3837 or jay_howard@webbschool.org for additional information on bequests or to chat more about the different options for including Webb School of Knoxville in your will or estate plan.
2. Seek the advice of your financial or legal advisor.
3. If you include Webb School of Knoxville in your plans, please use our legal name and federal tax ID.

Legal Name: Webb School of Knoxville
Address: Knoxville, TN
Federal Tax ID Number: 62-6552990

Make Sure You Have a Plan for All Your Assets
Download our FREE Personal Estate Planning Kit

9800 Webb School Drive, Knoxville, TN 37923

The information on this website is not intended as legal or tax advice. For such advice, please consult an attorney or tax advisor. Figures cited in examples are for hypothetical purposes only and are subject to change. References to estates and income taxes include federal taxes only. State income/estate taxes or state law may impact your results.
Myth #1

Be Aware of Opportunity
Use Creative Ways to Engage
Show Where Dollars Go
Myth #2

Giving Doesn’t End With a Planned Gift
The Game Is Changing

The Game Is Changing

- 10+ years of consistent giving: 59%
- Less than 5 years of giving: 21%
- Never made a gift to the charity: 20%

PG Impact on Annual Giving

Source: National Institute on Aging, Health and Retirement Study (2015)
5-year average growth in total fundraising
(2010 to 2015)

NONPROFITS receiving ONLY CASH gifts
2,548 nonprofits raising $1MM+ in 2010 reported only cash gifts in 2010 & 2015 on e-file IRS-990
11% GROWTH

NONPROFITS receiving ANY NONCASH gifts
4,236 nonprofits raising $1MM+ in 2010 reported noncash gifts in 2010 & 2015 on e-file IRS-990
50% GROWTH

NONPROFITS receiving SECURITIES NONCASH gifts
2,143 nonprofits raising $1MM+ in 2010 reported securities gifts in 2010 & 2015 on e-file IRS-990
66% GROWTH

Source: 1,055,917 nonprofit tax returns (IRS Form 990) filed electronically for the tax years 2010-2015 and part of 2016 with statistical analysis of the 761,876 forms from 205,696 nonprofit organizations reporting positive contributions.
The Typical Planned Gift is Roughly Equivalent to 100 Annual Gifts

Source: Philanthropy 100 Performance Benchmarking Initiative
Cost Per Dollar Raised

Source: Gonser Gerber Tinker Stuhr (2009)
Myth #2

Understand Ways Donors Engage
Inform Annual Giving Partners
Communicate UP to C-Suite
Myth #3

High Net Worth Donors Have Their Financial Affairs in Order
Financial Concerns Regarding Retirement Affect Most

“I have a secure financially sound plan for retirement”

(Top Box “Agree”)

- Total: 15%
- Men: 18%
- Women: 12%
- Millennials: 13%
- Gen X: 10%
- Boomers: 18%
- Matures: 26%

- Net Worth <$500K: 11%
- Net Worth $500K-2M: 40%
- Net Worth >$2M: 62%
## Importance of Having a Will

<table>
<thead>
<tr>
<th>Net worth Category</th>
<th>Importance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net worth &lt; $500K</td>
<td>41%</td>
</tr>
<tr>
<td>Net worth &lt; $500K-$2MM</td>
<td>59%</td>
</tr>
<tr>
<td>Net worth &gt; $2MM</td>
<td>67%</td>
</tr>
</tbody>
</table>
## Estate Planning Documents Prevalence

<table>
<thead>
<tr>
<th></th>
<th>Net Worth &lt;$500K</th>
<th>Net Worth $500K-$2M</th>
<th>Net Worth &gt;$2M</th>
</tr>
</thead>
<tbody>
<tr>
<td>Have a Will</td>
<td>29%</td>
<td>61%</td>
<td>71%</td>
</tr>
<tr>
<td>Have a living trust</td>
<td>14%</td>
<td>33%</td>
<td>48%</td>
</tr>
<tr>
<td>Have joint ownership of property that passes to the surviving owner</td>
<td>21%</td>
<td>54%</td>
<td>62%</td>
</tr>
<tr>
<td>Have a beneficiary designation on an IRA 401(k) or other retirement account</td>
<td>27%</td>
<td>61%</td>
<td>72%</td>
</tr>
<tr>
<td>Transfer on death (TOD) designation on a bank account, investment account or real estate</td>
<td>11%</td>
<td>28%</td>
<td>52%</td>
</tr>
<tr>
<td>None</td>
<td>44%</td>
<td>12%</td>
<td>11%</td>
</tr>
</tbody>
</table>
## Very Likely to Make a Planned Gift

<table>
<thead>
<tr>
<th></th>
<th>Arts &amp; Culture</th>
<th>Education</th>
<th>Secondary Education</th>
<th>Environmental/Animal Welfare</th>
<th>Faith Based</th>
<th>Healthcare</th>
<th>Human Services</th>
<th>International Affairs</th>
<th>Medical Research</th>
<th>Public/Society Benefit</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Net Worth &lt; $500K</strong></td>
<td>28%</td>
<td>26%</td>
<td>27%</td>
<td>26%</td>
<td>16%</td>
<td>29%</td>
<td>18%</td>
<td>27%</td>
<td>24%</td>
<td>28%</td>
</tr>
<tr>
<td><strong>Net Worth $500K-$2M</strong></td>
<td>25%</td>
<td>22%</td>
<td>13%</td>
<td>27%</td>
<td>39%</td>
<td>25%</td>
<td>20%</td>
<td>20%</td>
<td>18%</td>
<td>22%</td>
</tr>
<tr>
<td><strong>Net Worth &gt; $2M</strong></td>
<td>6%</td>
<td>65%</td>
<td>83%</td>
<td>44%</td>
<td>82%</td>
<td>43%</td>
<td>50%</td>
<td>9%</td>
<td>34%</td>
<td>54%</td>
</tr>
</tbody>
</table>

**High** | **Low**
## Interest in Issues Related to Charitable/Planned Giving

<table>
<thead>
<tr>
<th>Issue</th>
<th>Net Worth &lt;$500K</th>
<th>Net Worth $500K-$2M</th>
<th>Net Worth &gt;$2M</th>
</tr>
</thead>
<tbody>
<tr>
<td>Honoring a family member by making a tribute gift</td>
<td>21.2%</td>
<td>20.4%</td>
<td>28.1%</td>
</tr>
<tr>
<td>Charitable gift annuity</td>
<td>13.8%</td>
<td>11%</td>
<td>22.5%</td>
</tr>
<tr>
<td>Charitable remainder trust</td>
<td>10.9%</td>
<td>12.4%</td>
<td>24.1%</td>
</tr>
<tr>
<td>Immediate tax deduction in exchange for the right to inherit your home (or other land) at the end of your life</td>
<td>10.2%</td>
<td>10.9%</td>
<td>22.2%</td>
</tr>
<tr>
<td>Saving capital gains taxes by making a gift of stocks or bonds to a charity</td>
<td>8.6%</td>
<td>9.4%</td>
<td>29.6%</td>
</tr>
</tbody>
</table>
Most Donors Rely on Personal Preference When Considering a Planned Gift

“I would only make a charitable gift in my Will after consulting with an attorney, accountant or financial advisor.”

- 14% Net Worth <$500K
- 20% Net Worth $500K-2MM
- 23% Net Worth >$2MM
Leave the Last Slice for Us

Including a gift to DAR in your estate plan is a unique way to create a legacy that will sustain the Society into the future.

Start Planning Your Legacy Now

Enter your details below to download our brochure, A Guide to Making Your Will: Direct Your Assets to the People and Causes You Care About Most.

- [ ] Yes, I want to create my legacy so I can impact the future of DAR and our country. Please send me:
  - [X] information about including a gift in my will or trust.
  - [X] Bequest language to share with my attorney.

DOWNLOAD MY BROCHURE
Myth #3

Don’t Assume
Be Aware of Preferred Vehicles
Provide Tools
Myth #4

Most of Planned Giving is Just Plain Luck
The planning and execution of direct marketing should focus on building long-term connections with donors.
Partner with in-house teams to maximize your PG message
Create a calendar of all your marketing and organizational events
Create a calendar of all your marketing and organizational events.

- **Research, examine and test your list**
- **Plan beyond a 12-month cycle**
- **Use multiple channels to spread your message**
Characteristics
Motivational Drivers
Physical Considerations
List Selection
Millennials
Born 1977-1998
Ages 19-39

"Why do I need a will?"

74% Surf the Internet on a regular basis

90% Comfortable using new technologies

"I don’t know what planned giving is."
“How do I create a will?”

“There’s no money for planned giving right now.”

Gen X
Born 1965-1976
Ages 40-51

80% Surf the Internet on a regular basis

91% Comfortable using new technologies
Boomers
Born 1946-1964
Ages 52-70

“I’d like my money to go to my family.”

75% Surf the Internet on a regular basis
90% Comfortable using new technologies

“Where do I start with will planning?”
Matures
Born 1900-1945
Ages 71+

"What else should be in my will?"
"I've already made beneficiary designations."

67% Surf the Internet on a regular basis
85% Comfortable using new technologies
The mailing list is the most important factor in the success of your marketing efforts.

41% of your planned giving donors may not be on your radar.

Look beyond donation activity.
59% 10+ years of consistent giving
21% Less than 5 years of giving
20% Never made a gift to the charity
Serif

Lorem ipsum dolor sit amet, eu sed debet imperdiet, cu has quem summo comprehensam, te vis dicunt lucilius prodesset. Ad clita corpora eam, per cibo nonumy invidunt et. Vix molestiae euripidis comprehensam eu, ad rebum decore his. In autem oratio vocibus pro.

Sans Serif

Lorem ipsum dolor sit amet, eu sed debet imperdiet, cu has quem summo comprehensam, te vis dicunt lucilius prodesset. Ad clita corpora eam, per cibo nonumy invidunt et. Vix molestiae euripidis comprehensam eu, ad rebum decore his. In autem oratio vocibus pro.
Give. To help him live.

Families never receive a bill from St. Jude for treatment, travel, housing and food — because all a family should worry about is helping their child live.

This holiday season, put kids like Ethan on your list and help him and thousands of others have a chance at life.

Donate Now
Connect the dots for donors between gifts and mission

Focus on benefits

Show the value of current programs

Reinforce urgency— for the future
3 Steps to Better Planned Giving Communications

#1 Establish The Need
Dear Dawn, with our eighth consecutive year of record enrollment, Iowa State University is faced with a challenge.

"True to our land-grant mission, Iowa State is accessible and affordable; but with lagging state funding, we want to be sure we are growing at a pace that allows us to maintain high quality," Iowa State University President Steven Leath said.

Use Your IRA to Change Lives
If you are age 70½ or older, you can make a direct transfer from your IRA without paying taxes on the amount transferred. It’s a smart, effective way to make a big impact for students today. Besides the satisfaction of knowing that you are helping students receive a transformational education, you also benefit by paying no income taxes on the gift.

We’re Here to Help
Our office of gift planning is happy to answer any questions you may have about IRA gifts and other smart ways to make a difference for students. Simply contact us at giftplanning@foundation.iastate.edu or 800.921.8515.
3 Steps to Better Planned Giving Communications

#2 How Can I Make An Impact
Amanda Zuleide Maldonado is an avid student. If she even goes to school on Sunday, her grandmother says. To hear this 7-year-old speak about her passion for learning and her love of going to school is inspiring. “My dream, when I grow up, is to be a professional—to help my people.” — Amanda Zuleide Maldonado

My dream, when I grow up, is to be a professional—to help my people. — Amanda Zuleide Maldonado

A Place to Continue Learning
UNICEF’s Mobile Classrooms Keep Children in School Amid Disasters

Amanda Zuleide Maldonado

To hear this 7-year-old speak about her passion for learning and her love of going to school is inspiring. “My dream, when I grow up, is to be a professional—to help my people.”

It wasn’t that long ago that Amanda’s future educational pursuits were in jeopardy. When heavy rains caused the Parana and Paraguay rivers to flood in the summer of 2014, an estimated 245,000 Paraguayan Bed homes in search of a safer, drier environment. Among the displaced were 145,000 children, including Amanda.

Back to School
Despite living miles from her classroom, Amanda was able to attend school. With UNICEF’s support, Paraguay’s Ministry of Education installed 20 mobile classrooms, accommodating 2,800 students.

The temporary settlement where Amanda’s family relocated received one of these mobile classrooms. The school consisted of students from three separate institutions. Full-time teachers led classes that (Continued on Page 3)
Because of the thoughtful generosity of people like you, BrightFocus Foundation has been able to fund scientists to investigate causes, treatments and possible cures of diseases through our three programs—Alzheimer’s Disease Research, Macular Degeneration Research and National Glaucoma Research. These programs have provided funding for:

MORE THAN $87 million in Alzheimer’s disease research projects.
MORE THAN $15 million to scientists studying macular degeneration.
MORE THAN $24 million to scientists studying glaucoma.
3 Steps to Better Planned Giving Communications

#3 How Can I Get More Info?
Help Shape a Future for Tiffany and Andrew.

Prepare for your future and ensure your wishes areRemembered? andaria care in the event of an emergency, and after an emergency, by returning the enclosed "charitable bequest" form.

People With MS and Their Healthcare Providers. How Do You Want to Be Remembered? andaria care in the event of an emergency, and after an emergency, by returning the enclosed "charitable bequest" form.

WILLS AND LIVING TRUSTS

DEEPEN YOUR CONNECTIONS

You want to leave money to Loyola Blakefield in your will. You also want the flexibility to change your will in the event that life circumstances change. You can do both.

In as little as one sentence, you can complete your gift. This type of donation to Loyola Blakefield in your will or living trust helps ensure that we continue our mission for years to come.

Charitable Bequest, a gift from your will or trust.

MAKE A GIFT

NEXT STEPS

1. Contact Adam Trice at 443.841.3605 or atrie@loyolablakefield.org for additional information on bequests or to chat more about the different options for including Loyola Blakefield in your will or estate plan.
2. Seek the advice of your financial or legal advisor.
3. If you include Loyola Blakefield in your plans, please use our legal name and federal tax ID.

Legal Name: Loyola High School of Baltimore Inc.
Address: PO Box 6819, Towson, MD 21285-6819
Federal Tax ID Number: 52-0704627
Organization Specific
Real People
Emotional Images
More dogs!
Rediscovering Happiness
With the Help of LSI

For 11-year-old Jaden, school days are filled with learning and friends, as it should be.

But it wasn’t always that way.

Last year, Jaden went to the emergency room three times in three weeks, saying that he wanted to die or harm himself.

“He told me that’s just what he says when he’s upset, but as a mom I had to take that seriously,” says Jaden’s mom, Lani.

A Tough Decision
When Jaden began having behavioral health issues in kindergarten, his family and school worked together to find him counseling and support. But after those visits to the hospital, Jaden’s parents knew he needed more intensive care. They made the difficult decision to place him at LSI’s Beloit Residential Treatment Center in Ames.

“It was hard not to see him every day, but I could feel comfortable knowing that he was getting the right kind of care and counseling. Getting the help he needed was worth it,” Lani says.

Showing Improvement
During his four months at Beloit, Jaden learned skills to communicate his feelings, cope with frustration, make friends and do better at school.

“Before he needed a classroom aide all the time,” says Lani. “He gradually moved away from having an aide for behaviors to just academics, and now it’s not even that much. He used to go to a behavior intervention room for lunch and recess, but now he goes to the cafeteria with his friends and has no problems.”

Continued on Page 3

“It was hard not to see him every day, but I could feel comfortable knowing that he was getting the right kind of care and counseling. Getting the help he needed was worth it.”

— Jaden’s mother
Frequent Donors are Significantly More Likely Than Infrequent Donors to Own One or More Dogs

47.2% vs. 42.6%
A Better Tomorrow Starts With You

Discover simple ways to take your charitable legacy to the next level without putting your daily budget at risk. With your support, you can make a big impact on Saint Mary's College of California.

Learn more.
Myth #4

Be Planful
Understand Your Audience
Show Impact
Key Take Aways

Create a thoughtful communication plan

Talk to your donors “where they’re at”

Provide tools to plan

Be flexible
The Evolution of Planned Giving Marketing

Debunking 4 Common Myths

Questions?

Nathan Stelter
Vice President
nathan@stelter.com

FREE Resources!!
https://blog.stelter.com
http://www.stelter.com/white_pape