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IN PLANNED
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SUCCESS



Planned Giving Marketing: What Works, What Doesn't, and What's Next

Date: August 28, 2025
Time: 1:00 – 2:00 Eastern
Presenter: Andrew Palmer
Senior Director of
Marketing Services

How satisfied are you with your current marketing?

- **Mostly/Very satisfied:** ~62% combined
- Dissatisfied / need to do more: ~38%

👉 Most organizations are doing *something* and feel okay about it, but more than **a third admit they're underperforming**. This suggests a significant appetite for *scaling up* and improving.



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What is your most important goal for marketing?

- **Raising awareness: 38%**
- **Donor education: 31%**
- **Lead generation: 31%**

👉 The field isn't driven by one dominant goal. Instead, organizations are split between *awareness/education* and *direct response (leads)*. A balanced is needed.

Tell Me More

☐ Yes, please **mail** me my FREE Estate Planning Guide.

☐ Yes, please **email** me my FREE Estate Planning Guide.

☐ I would like information on how to support the future of Brandeis through a planned gift.

☐ I have already included Brandeis in my will or other estate plans.

Name _____

Address (if changed) _____

City/State _____ Zip _____

Email _____

Telephone _____





485 South Street, 301-122
Waltham, MA 02455



Organize your estate planning today!

Although the idea of estate planning can be intimidating, even a simple estate plan can provide you with peace of mind. It's reassuring to know your wishes have been made clear.

If you are like 60% of Americans who have put off their estate planning, please contact us or visit us online for a free estate planning guide to get started today. Whatever the size of your estate, it is important to have a plan that will provide for the needs of your loved ones and honors your philanthropic passions.

We are here to help you enjoy peace of mind while making a lasting impact at Brandeis. For more information contact:

Joel Carlton-Gysan
Executive Director, Planned Giving
781-736-7719
jcarlton@brandeis.edu

With a proper estate plan, you can:

- Take care of your immediate family and friends
- Get your property to beneficiaries quickly
- Plan for incapacity
- Choose executors/trustees for your estate
- Ease the strain on your loved ones
- Reduce taxes on your estate
- Help support Brandeis University

Brandeis

Your Estate Planning Guide

Control of
The Office of Planned Giving

To request your paper or digital copy of the estate planning guide, return the response card. Or to download your guide, visit plannedgiving.brandeis.edu/estate

BUSINESS REPLY MAIL

POSTAGE WILL BE PAID BY ADDRESSEE

BRANDEIS UNIVERSITY
PLANNED GIVING
PO BOX 8110
WALTHAM MA 02455-0810

Do you have a written planned giving marketing plan?

- **No written plan: 59%**
- Yes plan: 41%

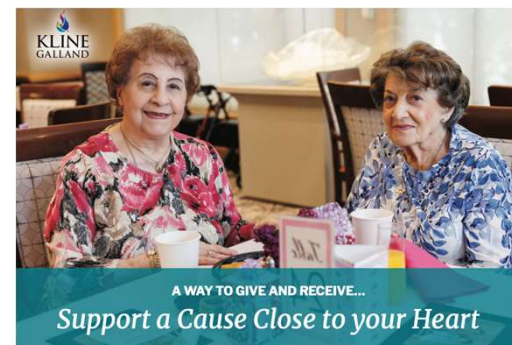
👉 A majority operate without a formalized strategy—indicating room for improvement in disciplined, year-over-year marketing planning.

Schedule	Channel	Theme Gift Type Audience
Apr-May	Print Mailing 1 Postcard	<p>THEME: It's simple to change the future</p> <p>GIFT: Bene Designations</p> <p>AUDIENCE: Donors who are 45+ and have given 3-5 or more gifts in the last 5-7 years.</p> <p>Follow up with email two weeks after mailing</p>

What is the most important theme you want to convey?

- **Many ways to create a legacy: 39%**
- Impact of a gift: 32%
- Simplicity: 21%
- Tax benefits: 7%

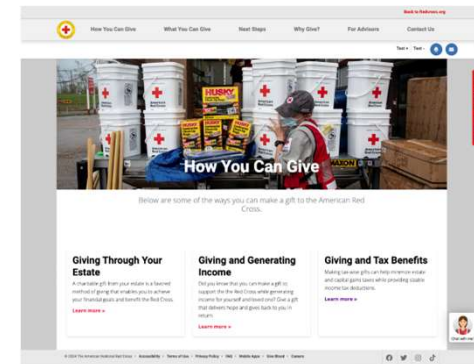
👉 Donor-centered storytelling dominates (**legacy & impact**). Technical/tax messaging is low priority—confirming a sector-wide shift toward *emotion and simplicity over complexity*.



What tactics have you used in your marketing?

- Planned giving website (87%)
- Print newsletters (52%)
- Print Postcards (62%)
- Digital newsletters (55%)
- Donor surveys (31%)
- Social media (30%)

👉 A mix of traditional **print-heavy** methods with growing—but less dominant—digital usage.





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What tactic has been most AND least effective?

- **Most effective tactics:**
 - Traditional print postcards (30%)
 - Planned giving websites, newsletters, donor surveys, educational events (each ~15%)
 - **Least effective tactics:**
 - Social media (29%)
- 👉 Print still outperforms digital in this field, while social media is seen as the least effective.



Giving Back, Giving Forward, and Leaving Your Legacy.

When you make a legacy gift to Columbia, you pave the way for future generations to be inspired, feel empowered, and ultimately to flourish. It can completely transform the heights Columbia students, faculty and researchers can reach. Donors are a diverse group with uniquely personal reasons for supporting the university. Explore their stories and experience the impact a single gift can have on the future of Columbia, and the world.

Impact Makers

Do you have a legacy society & how do you promote it?

- **Yes:** 89% have one
- Promotion: 52% automatically enroll donors; But only 17% promote the benefits

👉 Legacy societies are well established but **not nearly marketed enough.**



Which gift types do you promote in your marketing?

- Bequests, IRA rollovers/QCDs, **93%**, Most common
- Complex gifts (CRTs 34%, CGAs 65%, real estate 4%), Less emphasized

👉 Simplicity rules—aligns with donor behavior and earlier messaging trend. **65% market DAFs!**



Turn your retirement savings into a meaningful gift.

Looking for a way to make a tax-free gift and support the LA Phil? Consider an IRA charitable rollover.

If you are age 70½ or older, the IRA charitable rollover (also called a Qualified Charitable Distribution or QCD) allows you to contribute up to \$108,000 in 2025 from your IRA directly to the LA Phil with no tax on the withdrawal.

If you are 73 or older, the transfer counts toward your Required Minimum Distribution (RMD) and you'll avoid paying income tax on the distribution. Your RMD is a mandatory distribution from your IRA that needs to be completed by year's end.

Contact your IRA administrator for distribution forms and requirements.

We're here to help!

LA Phil Office of Gift Planning
Genevieve, Abby, Fabian, and Taylor
legacy@laphil.org | 213 972 3458

Visit us at plannylegacy.laphil.org/IRA to learn more.

LA Phil
GUSTAVO BUDAMEL
MUSIC & ARTISTIC DIRECTOR

1515 Grand Avenue
Los Angeles, CA 90012





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Which outcomes have you observed from marketing?

• Top results:

- More donor inquiries (58%)
- Confirmed new planned gifts (58%)
- Engagement from quiet donors (55%)

👉 The programs that are active are producing *direct donor activity and gift confirmations*.

Tell me more

I WOULD LIKE INFORMATION ABOUT:

☐ Making a bequest to AMC.

☐ Other creative ways I can include AMC in my estate plan.

☐ I have already included AMC in my estate plan. Please send me info on the Summit Trust.

Name _____

Address _____

City State Zip _____

Email _____

Telephone _____

Visit legacy.outdoors.org to explore more ways to give today.

BE OUTDOORS
APPALACHIAN MOUNTAIN CLUB

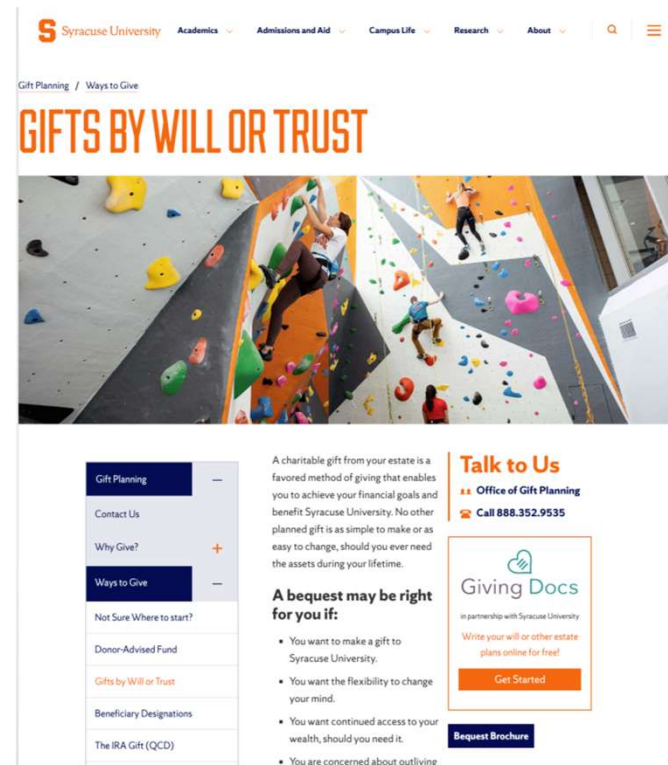
Appalachian Mountain Club
Attn: Planned Giving Office
10 City Square, Suite 2
Boston, MA 02129

The Power of Planning

BE OUTDOORS
APPALACHIAN MOUNTAIN CLUB

Do you use separate estate planning tools on your website?


- 67% don't use them
 - **Main barriers:** unclear ROI (28%) and budget (24%)
 - **Users:** Mostly FreeWill
- 👉 Adoption is still limited, but perception of value is mixed. Budget and clarity issues prevent wider uptake.



Size and type of programs surveyed?

- Representation Dominated by Higher Ed (38%)
- 44% are “teams of one”
- 30% have 2–3 staff
- 22% have 5+ staff

👉 Most planned giving programs are *lean*—marketing capacity is constrained.



UC Irvine Legacy Connections

Mary Watson-Bruce '82 Celebrates Her Husband's Legacy with an Endowment for Future Historians

When her husband passed away in 2014, Mary Watson-Bruce and her daughter Emily wanted to immortalize his legacy. After all, UC Irvine had been their home for over four decades.

Dickson D. Bruce, who went by Dave, was a professor emeritus of history beloved for his sense of humor, humility and kindness. During his 37-year career at the university, he served as associate dean of graduate studies and director of the program in comparative cultures. Mary, too, was a fixture of the campus community, serving as the university's associate director of geriatric medicine after she earned her Ph.D. in social sciences with a specialization in aging in 1982.

[Read More](#)

Start the Year with Impact: Smart Giving Strategies

The new year – an opportunity for recalibrating and for starting anew. Even if you are not motivated to make New Year's Resolutions, this is the ideal time to begin planning ahead, including for your charitable giving for the coming year. Consider the following tax-smart techniques to support University of California Irvine Foundation this year. Some donors choose more than one option in order to benefit from both income tax advantages now as well as to leave a lasting legacy later.

[Read More](#)

UC Irvine Legacy Society


We welcome all who commit to supporting UC Irvine through a bequest, beneficiary designation, or other planned gift to become members of the UC Irvine Legacy Society. Membership benefits include:

- Invitations to special events including our annual Legacy Society luncheon
- Legacy Society letter and exclusive Legacy Society pin
- Personalized assistance from our experienced planned giving professionals

Please call or visit our [website](#). We will be pleased to provide more information.

Jiesi Zhao Thomas, Esq.
Executive Director
UCI Office of Planned Giving

[Contact Us](#)



Advice & Cautionary Tales

- **Donor-centered messaging:** Sell the *impact* and *legacy*, not the product.
- **Consistency matters:** Ongoing communication is key (postcards, newsletters, surveys).
- **Stewardship before marketing:** Don't overpromise without capacity to nurture donors.
- **Surveys & events work:** Especially targeting women and high-net-worth donors.
- **Messaging alignment:** Ensure materials reflect your org's voice, not just vendor boilerplate.

Key Trends & Takeaways

- **Simplicity + Legacy Language is Winning** → Donors respond best to easy, mission-centered options.
- **Print Outperforms Digital** → Postcards and print newsletters drive the most engagement.
- **Estate Planning Tools Still Emerging** → Budget and ROI concerns limit adoption; Need a new player.
- **Capacity Constraints** → With most teams 1–2 people, outsourcing and vendor support play a big role.
- **Stewardship is Critical** → Marketing without stewardship risks donor trust.

**What is the best way to
promote new gift
planning website?**



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Promote a website

Tell Me More

- ☐ Yes, please **mail** me my FREE Estate Planning Guide.
- ☐ Yes, please **email** me my FREE Estate Planning Guide.
- ☐ I would like information on how to support the future of Brandeis through a planned gift.
- ☐ I have already included Brandeis in my will or other estate plans.

Name _____
Address (if changed) _____
City, State _____ Zip _____
Email _____
Telephone _____



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- Plan for incapacity
- Choose executors/trustees for your estate
- Ease the strain on your loved ones
- Reduce taxes on your estate
- Help support Brandeis University

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Executive Director, Planned Giving
781-736-7719
jcarlton@brandeis.edu



To request your paper or digital copy of the estate planning guide, return the response card.
Or to download your guide, visit plannedgiving.brandeis.edu/estate



BUSINESS REPLY MAIL
FIRST CLASS MAIL PERMIT NO. 1000 BOSTON, MA
POSTAGE WILL BE PAID BY ADDRESSEE

INSTITUTIONAL ADVANCEMENT
BRANDEIS UNIVERSITY
MAILSTOP 126
75 WASHINGTON STREET
WALTHAM, MA 02454-8688



8/28/2025

© PG Calc 2025

15

Where do you start with Social media marketing?

Do you have managed pages or groups related specifically to PG?

Donor Stories



Giving Back, Giving Forward, and Leaving Your Legacy.

When you make a legacy gift to Columbia, you pave the way for future generations to be inspired, feel empowered, and ultimately to flourish. It can completely transform the heights Columbia students, faculty and researchers can reach. Donors are a diverse group with uniquely personal reasons for supporting the university. Explore their stories and experience the impact a single gift can have on the future of Columbia, and the world.

[Impact Makers](#)

How effective are planned giving newsletters?

Print and digital

How should we ramp up our messaging when this has traditionally been minimal in our organization?

Inserts get stuffed



Creating a Legacy at HopeHealth: *Ed Jankowski*



When Ed Jankowski's wife, Joyce, was diagnosed with cancer and suffered a stroke, he retired from his career as a federal civil servant to care for her. Throughout Joyce's illness, Ed never left her side, even when she received hospice care at home with HopeHealth. After her death, Ed's HopeHealth grief counselor helped him process his grief. Ed gives monthly to HopeHealth and has made a legacy gift in honor of the care Joyce and he received.

"This is an organization I am proud to support. You can name HopeHealth as a beneficiary of an insurance policy or annuity, or give through an IRA distribution. I decided to do all three. My legacy gift will help other families."

If you're interested in discussing a legacy gift to HopeHealth, contact Suzanne Fortier, Chief Philanthropy Officer at (401) 415-4690 or email SFortier@HopeHealthCo.Org



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Let them ask for more



To learn more about charitable gift annuities or other ways to make your impact with UCS, please return this reply card or contact:
UCS Planned Giving Team
(617) 301-8095
plannedgiving@ucsusa.org

You can visit aet.ucsusa.org/CGA or scan the QR code to calculate your personalized benefits.



I would like more information on:

- ☐ Charitable gift annuities
Beneficiary age(s)/date(s)
of birth:

Sample gift size(s):

- ☐ Leaving a gift in my will, trust,
or retirement account.

- ☐ I am pleased to inform you
that I have included UCS in
my estate plans.

Union of
Concerned Scientists

Name _____
Address _____
City/State/Zip _____
Email _____
Phone _____

Yes, I would like to learn how I can make a gift that I never imagined was possible.

- ☐ I would like to speak with someone about making a gift through my will, life insurance, or retirement plan assets
☐ Please send me information on how to include Martin Health System in my future plans
☐ I would like to learn how to make a gift and earn income for life
☐ I have already included Martin Health System in my will

Contact Information Update

Email _____

Telephone _____

Get Your Estate Planning Guide
Visit giftplanning.martinhealth.org/guide
to download a complimentary estate
planning guide.

If you wish to have your name removed from the Martin Health Foundation fundraising list, please notify us by phone at 772.223.5634, by email at MHF.optout@martinhealth.org, or by mail at P.O. Box 9010, Stuart, FL 34999-9010.
A copy of the official registration and financial information may be obtained from the Division of Consumer Services by calling toll-free, within the state, 1-800-helpfla or via the Internet at www.B00helpfla.com. Registration does not imply endorsement, approval or recommendation by the state.

Tell Me More

- ☐ I would like a personalized example of how I can benefit from a charitable gift annuity based on the following date(s) of birth _____ and _____ in the amount of \$ _____.

- ☐ I would like more information on ways to include Children's National in my will, trust, or other estate plan.

- ☐ I have already included Children's National in my estate plans.

Name _____

Address (if changed) _____

City, State _____ Zip _____

Email _____

Telephone _____

For confidentiality, fold on dotted line, tape, and return.



Name(s) _____ Class Year _____

Address _____

City, State, Zip _____

Home Phone _____

Other Phone _____

Email Address _____

For confidentiality, fold on dotted line, tape, and return.

Please send me:

- ☐ a copy of your Charted Giving Plans booklet

I am interested in learning more about:

- ☐ planning my estate
☐ a gift by will or trust
☐ a charitable IRA distribution
☐ a gift that provides income for life

I am pleased to inform you that:

- ☐ I have included West Point in my estate plans.
☐ I am considering including West Point in my estate plans.

If you have any questions, contact:

West Point Association of Graduates
Planned Giving Office
845.446.1627
plannedgiving@wpaog.org

Visit our planned giving website at
giftplanning.westpointaog.org

Fall 2024



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Always Be Closing

Jenny R. Papageorge, CAP

she/her/hers

Director of Planned Giving, Development

Cooley Dickinson Hospital

Cooley Dickinson VNA & Hospice

30 Locust Street, Northampton, MA [01061-2942](tel:555-555-5552)

T 555-555-5555, F 555-555-5550

cooleydickinson.org/giving

Interested in a gift that provides you or a loved one with payments for life? Ask me about our [Charitable Gift Annuity Program](#).



The screenshot shows the Cooley Dickinson Hospital website. The header includes the hospital name, navigation links for Programs & Services, Doctors & Providers, Appointments & Referrals, and a search bar. The main banner features a large image of the hospital building with the text "Planned Giving" and "YOUR COMMUNITY, YOUR VISION: LEAVE A LEGACY OF COMPASSIONATE CARE". Below this, there's a section for "Charitable Gift Annuities" with a list of bullet points and a "MORE ON CHARITABLE GIFT ANNUITIES" link. To the right, a sidebar titled "PLANNED GIVING" lists various options like "Why Give?", "Plan Your Future", "Giving Options", and "What You Can Give". At the bottom, a section titled "How Your Gift Helps" shows three images of the hospital and its community, with captions: "be among the nation's best community health care systems", "have a constant focus on quality and safety, never settling, always improving", and "show genuine concern for our patients, families, and colleagues".

Mass General Brigham
Cooley Dickinson Hospital

Programs & Services Doctors & Providers Appointments & Referrals

How can we help you? MENU

Planned Giving

YOUR COMMUNITY, YOUR VISION: LEAVE A LEGACY OF COMPASSIONATE CARE

GIVE NOW

Charitable Gift Annuities

A charitable gift annuity provides fixed payments for life in exchange for a gift of cash or securities to Cooley Dickinson Hospital. Gift annuities are easy to set up and the payments you receive are backed by the general resources of Cooley Dickinson Hospital.

A charitable gift annuity could be right for you if:

- You want to maintain or increase your cash flow
- You want the security of fixed, dependable payments for life
- You want to save income taxes or capital gains taxes
- You would like income that is partially tax-free
- You want to make a generous gift to Cooley Dickinson
- You are considering a gift amount of \$10,000 or more
- You are at least 60 years of age
- You want to use your QCD to create a one-time annuity

MORE ON CHARITABLE GIFT ANNUITIES

DEFERRED CHARITABLE GIFT ANNUITY

PLANNED GIVING

Why Give?
Plan Your Future
Giving Options
Gifts by Will or Trust
Naming Life in Your Assets
Life Income Gifts
Referred Life Policies
Specialized Giving Arrangements
Maximize your Giving: The Perfect Blend for You
What You Can Give
Resources
Contact Us
Giving to VNA & Hospice

TALK TO US

Our Office of Planned Giving
Call (413) 582-2255

How Your Gift Helps

Your gifts to Cooley Dickinson Health Care help to serve our patients and communities with exceptional, compassionate, and personalized care. It will provide Cooley Dickinson with the resources to...

be among the nation's best community health care systems

have a constant focus on quality and safety, never settling, always improving

show genuine concern for our patients, families, and colleagues

Magazine ads [Annual Giving Report/Alumni News]

What *legacy* will you leave?



As you look back fondly on your St. Sebastian's days—on your teachers, coaches and classmates—think about how you can help ensure future St. Sebastian's students have an education that is just as exceptional and life-changing as yours.

If education changes lives then charitable gifts to education help make that change possible.

Learn how a charitable gift to St. Sebastian's, like a bequest in your will or living trust, can match your goals, values, and what you hope your lasting legacy will be.

For more information about gift planning and including St. Sebastian's in your estate plans, contact Ed Davis '65 in the Office of Planned Giving at 781.347.0158 or ed_davis@stsebs.org or visit plannedgiving.stsebs.org.

ST. SEBASTIAN'S SCHOOL
Rev. Charles D. McInnis Society

Is it effective to base a marketing calendar around themed time periods?

like Make-a-Will Month?



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Make-a-Will Month



Tell me more

- I WOULD LIKE INFORMATION ABOUT:
- ☐ Making a bequest to AMC.
- ☐ Other creative ways I can include AMC in my estate plan.
- ☐ I have already included AMC in my estate plan. Please send me info on the Summit Trust.

Name _____

Address _____

City/State/Zip _____

Email _____

Telephone _____

Visit legacy.outdoors.org to explore more ways to give today.



Create Your Legacy Today

Did you know August is Make-a-Will Month? It serves as an annual reminder that your will is the key to your legacy and protecting your family's future.

A will is your opportunity to say who receives what from your estate. Surprisingly, the majority of people die without a valid will. Without a will, state law will determine how your estate is distributed—even if it is not what you intend.

A charitable gift in your will—a charitable bequest—is an easy and flexible way to support the Appalachian Mountain Club and protect the outdoors. You can give a dollar amount, specific items, or designate a percentage of your estate.

If you already have a will, you can add a gift to AMC with a simple amendment.

If you would like more information about how you can make a charitable bequest gift to AMC please contact:

Stephanie Schiele
sschiele@outdoors.org, 617-391-6638

To learn more, visit us online at:
legacy.outdoors.org



Appalachian Mountain Club
Attn: Planned Giving Office
10 City Square, Suite 2
Boston, MA 02129



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Market your events


Treasure Coast Hospice Foundation
SUPPORTING THE QUALITY HEALTH SERVICES

Please join us for a special presentation:

Don't Let Taxes Steal Your Legacy

March 30, 2022 - 10:00 AM
At Treasure Coast Hospice
3201 SE Indian St., Stuart
Light refreshments will be provided

Seating is limited.
RSVP by March 1 at
treasurehealth.org/legacy
Or call Ashley Haughton,
CFRE at 772.403.4594



Join our discussion on
important estate planning
documents, estate taxes,
and charitable giving.



To RSVP scan the QR code, call Ashley
Haughton at 772.403.4594 or visit us
online.

treasurehealth.org/legacy

This presentation is provided free of charge by local
professionals to help attendees learn ways to protect
their legacy.

As a community-based, not-for-profit hospice, Treasure
Coast Hospice has guided patients and their families
through their most difficult stages of life, providing
extraordinary, quality end-of-life care to our community
since 1982.

We are grateful for your support!

Treasure Coast Hospice
Foundation
3201 SE Indian Street
Stuart, FL 34959-1888

NewPost Dig
U.S. Postage
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Star Post Box #1
Stuart, FL

COUNT ME IN!

I am interested in attending:

- ☐ July 19 - Friends Forever™—Estate Planning for your pets
- ☐ September 14 - Estate Planning—Fact vs. Fiction
- ☐ October 25 - Lunch & Learn—Estate Planning doesn't need to be scary
- ☐ Please send information about how I can include OHS in my will, trust, or beneficiary designation.

Name: _____
Address (if change): _____
City/State: _____ Zip: _____
Email: _____
Telephone: _____

All requests for information are confidential.

Summer 2022



For confidentiality, mail or submit this page and photo.

You are invited to
Oregon Humane Society
Legacy Giving Events





Join us for three Lunch & Learn informational sessions in 2022.

July 19 Friends Forever™—Estate Planning for your Pets

Join OHS experts for an event focused on ensuring your pets receive the love and care they deserve if you were ever unable to care for them. The entire program will focus on the benefits of and how to enroll your pets in the care of surviving pet program, *Friends Forever*™.

September 14 Estate Planning—Fact vs. Fiction

Learn how to navigate the difference between estate planning facts compared to common myths.

Presenter: Tammi M. Carens, Esq.
Attorney with Carens Law, PC

October 25 Lunch & Learn—Estate Planning doesn't need to be scary.

Back due to popular demand, Gregory Harris returns to OHS with his humorous and succinct pointers for effective estate planning.

Presenter: Gregory E. Harris, Esq.
Attorney with Harris & Bowker, LLP

All Events:

Noon - 1 PM at Oregon Humane Society
Lunch will be provided.

RSVP to Emma Rogdanskas 503-802-6799 or
legacyteam@oregonhumane.org.





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Make special anniversary gift



CLASS OF 1974

LOYOLA
UNIVERSITY CHICAGO

Leave your mark on Loyola

50TH REUNION GIVING - A MILESTONE GIFT

Your 50th Reunion is a time to reflect on your Loyola experience, reconnect with classmates, and celebrate together. Reunion giving honors your Loyola mentors, professors, and relationships while helping to launch today's Loyola students as they begin their own journey.

Here are a few gift types to consider:

- **Bequest** — name Loyola as a percent or dollar amount remainder beneficiary in your will or trust.
- **IRA Qualified Charitable Distribution** — give directly from your IRA if you are 70½ or older.
- **Beneficiary Designation** — name Loyola a beneficiary of your retirement accounts, bank and brokerage accounts, or paid-up life insurance policies.
- **Charitable Gift Annuity** — in exchange for a gift to Loyola, you will receive guaranteed fixed payments for life.

Did you know planned gifts also count toward your 50th Reunion giving? Whether you're ready to create a new planned gift or you want to tell us about one that you've already made, it's a great way to make a difference.



**CLASS OF 1974 50TH REUNION CELEBRATION
MAY 3-5**

Don't miss this memorable weekend to reflect, reconnect, and celebrate your bond with you classmates and alma mater.

Register at Loyola.edu/almem.

START PLANNING NOW!

Your 50th Reunion gift is a vote of confidence in Loyola and an investment in its future. Paying it forward makes it possible for future Greyhounds to experience the impact of a Jesuit, liberal arts education as only Loyola can provide. Please contact us with any questions.

To learn more, please contact:
Mary L. Mazurka
Assistant Vice President, Major Gifts
mazurka@loyola.edu
410-617-2797



Dartmouth
GEISEL SCHOOL OF
MEDICINE

**CELEBRATE YOUR
REUNION WITH AN
ira charitable rollover**

TO BENEFIT THIS YEAR, ACT BY DECEMBER 31, 2020

A reunion is a time for us to reflect on our Dartmouth Medical School/Geisel School of Medicine experiences, reconnect with classmates, and celebrate together. As you plan your reunion gift, keep in mind that contributing cash is just one way to support the Geisel School of Medicine. You may wish to consider a Charitable Rollover from your IRA, a tax-smart technique.

For those over the age of 70½, you can make a tax-free gift of up to \$100,000 to Geisel directly from your IRA. Such a distribution is not subject to income tax, as it would be if you made a withdrawal from your IRA and then made a gift. If you want to learn more, please complete, and mail the other side of this card, or contact:

Questions? Ideas?

Contact Judi Taylor Cantor, Director of Planned Giving
C or text: 617-407-9390
judi.t.cantor@hitchcock.org

START PLANNING NOW

During this milestone year, your reunion gift is a tribute to your DMS and Geisel mentors and professors, the relationships and experiences you enjoyed on campus 50 or more years ago, and it is a gift to today's Geisel students who are just beginning their journey.

Your reunion gift is a vote of confidence in Geisel and an investment in the future. You are paying it forward by ensuring that a Geisel education remains accessible to the most deserving students. Our Planned Giving Office stands ready to work with you and your advisors to explore options for your reunion gift.



YOUR
PARTNER
IN PLANNED
GIVING
SUCCESS

End of Year Giving

Tell Me More

I would like more information on:

- ☐ A gift of appreciated securities
- ☐ A gift from my IRA
- ☐ A gift in my will
- ☐ A gift of life insurance
- ☐ Gifts that provide income

Name _____


Address _____

City, State _____ Zip _____

Email _____


Telephone _____


For confidentiality, fold on dotted line, tape, and return.



UNIVERSITY OF
CENTRAL FLORIDA

UCF Advancement | UCF Foundation, Inc.
University of Central Florida
12424 Research Parkway
Suite 250
Orlando, FL 32826






UNIVERSITY OF
CENTRAL FLORIDA

STRATEGIC GIVING NOW AND FOR THE FUTURE

KEEP REACHING FOR THE STARS

Your gifts will help UCF continue to provide educational experiences for future generations of Knights. When you join other like-minded UCF donors who recognize the power and promise of higher education, you can make a difference.



WANT TO MAKE A GIFT BEFORE 2022 ENDS?

Give With Your IRA Qualified Charitable Distribution (QCD)
If you are 70½ or older, you can make a tax-free gift of up to \$100,000 to UCF directly from your IRA account. A QCD counts towards satisfying the required minimum distribution and offers great tax savings even if you do not itemize deductions.

Use Your Appreciated Securities
Even if they have lost value recently, giving appreciated securities owned for at least one

year is an especially tax-smart gift. You receive an income tax charitable deduction equal to the full market value and avoid capital gains tax on the appreciation in value of securities that you contribute.

Donor-Advised Funds
The donor-advised fund (DAF) is becoming an increasingly popular way to simplify your year-end charitable giving. You can make an outright gift by recommending a grant to UCF or designate UCF as the remainder beneficiary of your DAF account.

WANT TO MAKE A GIFT FOR THE FUTURE?

A Gift In Your Will
Retain control of assets during your life while preserving flexibility in case your circumstances change.

Gifts That Pay You Back
Charitable gift annuities and remainder trusts pay you income for life, offer tax savings, and create a future gift.

Life Insurance
Donate paid-up policies no longer needed or add UCF as a percentage beneficiary.

To learn more about making a gift, please contact:
Kathleen Hagerty
Assistant Vice President, Gift Planning
407.882.1237 or kathleen.hagerty@ucf.edu
ucf.giftlegacy.com

Place
Stamp
Here

UCF Advancement | UCF Foundation, Inc.
12424 Research Parkway
Suite 250
Orlando, FL 32826

**Any suggestions for
marketing CGAs,
especially DGAs?**



YOUR
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SUCCESS

It's why rate charts work...

CONFIDENTIAL REPLY

I want to help save lives
and advance care.

PLEASE SEND ME INFORMATION ABOUT:

- ☐ Charitable gift annuities
- ☐ Funding a gift annuity with stock
- ☐ The Healthier Tomorrows Campaign
- ☐ Other creative ways to give and save taxes

Name _____

Address _____

City _____ State _____ Zip _____

Email _____

Phone _____

For confidentiality, add an address line, phone, and return.

 **Baystate Health
Foundation**
280 Chestnut St, Springfield, MA 01199

Nonprofit
U.S. Postage
PAID
Springfield, MA
Permit No. 830



Make a Gift, Create an Income Stream for Life

Many donors have seized upon the power of a charitable gift annuity in generating income, saving taxes and making a meaningful gift. With rates the highest they have been in 15 years, now is a terrific time to explore this gift.


Here's how one donor did it:

- Sarah created a charitable gift annuity with Baystate Health Foundation to support cancer care.
- She increased her dependable, fixed income for life with the secure gift annuity payments.
- She also benefitted from a sizeable tax deduction the year of her gift and other tax-saving opportunities.
- By funding the CGA with highly appreciated Microsoft stock, she reduced her capital gains tax and trimmed her exposure to market fluctuations.
- Best of all, she created a tribute to her late brother with a gift to bring the best in care to cancer patients.



A charitable gift annuity is a powerful way to establish a meaningful legacy, save on taxes, and help ensure the vitality of Baystate Health well into the future.

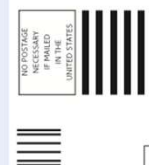
To see how a charitable gift annuity could work for you, and receive a personalized gift illustration, please contact Kylie Johnson, CAP at **413-794-7789** or **Kylie.Johnson@BaystateHealth.org**, or visit **planmygift.baystatehealth.org**.



Sample rates based on \$10,000 gift

Age	Annuity rate	Annual annuity	Charitable deduction
65	5.7%	\$570	\$3,800
70	6.3%	\$610	\$4,000
75	7.0%	\$700	\$4,360
80	8.1%	\$810	\$4,700
85	9.1%	\$910	\$5,410
90	10.1%	\$1,010	\$6,230

Please note that this information is for illustrative purposes and is not intended as tax or legal advice. Rates are subject to change and are based on rates suggested by the American Council on Gift Annuities. Gift annuities are not available in all states.



BUSINESS REPLY MAIL
FIRST CLASS PERMIT NO. 830 SPRINGFIELD, MA

POSTAGE WILL BE PAID BY ADDRESSEE
BAYSTATE HEALTH FOUNDATION
BAYSTATE HEALTH
PO BOX 1169
SPRINGFIELD MA 01101-3768





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Personalize Marketing with *BatchCalcs*

Why Use BatchCalcs?

- ✓ **Individualized Calculations:** Deduction, annuity rate, annual payment, tax-free portion, and duration
- ✓ **Flexible Inputs:** Target amounts can vary by donor or be fixed across the mailing
- ✓ **Output Options:** Receive a data file for mail merge
- ✓ **Add-On Value:** Include a Summary of Benefits chart with each illustration

MCPHS
UNIVERSITY

[Date]

[Name]
[Address]
[City, State, Zip]

Dear [Salutation],

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum

If, for example, you were to create a **\$25,000** cash gift annuity, you could receive [SPayment] in annual payments, and a federal income tax charitable deduction of [CharitableDeduction] in the year of your gift, at an annuity rate of [PayoutRate].



* Based on IRS Discount Rate of 100%. Calculations are for illustration purposes only.

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum

With appreciation,

Marguerite C. Johnson '61
Senior Vice President and Chief of Staff

p.s. - If you have questions, please feel free to contact Lanny Towles, executive director of development operations - email: lanny.towles@mcphe.edu, phone: 617.732.2280, website: legacygiving.mcphe.edu/cga.

www.mcphe.edu

Boston, MA Campus 179 Longwood Avenue | Boston, MA 02115

| 617.732.2800 | 617.732.2801

Any proven strategies to encourage documentation of Estate Commitments?



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SUCCESS

Find intentions

ARE YOU A
SECRET ADMIRER?

Grinnell College

PLEASE LET
US KNOW!

Brooklyn
College

ARE YOU
A SECRET
ADMIRER?

WPI





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SUCCESS

Be different

Tell Me More

- ☐ I would like more information on ways to include Columbia in my estate plans.
- ☐ I am pleased to inform you that I have already included Columbia in my estate plans.

Name _____

Address _____

City, State _____ Zip _____


Email _____

Telephone _____

 COLUMBIA | Office of Gift Planning
622 West 113th Street, MC 4518, New York, NY 10025

Not confidentially held on sealed line, tape, and return.

Raise your hand.

 COLUMBIA | Office of Gift Planning

Dr. Pierre Dubois experimenting on the diminished gravity pull exerted by the ice in the Amundsen Sea, West Antarctica.
Photo credit: Dr. Jason Gilbert

1754 Society members are forward-thinking alumni and friends who remember Columbia in their wills, trusts, or other estate plans. There is no minimum to join and all ages are welcome.

Let us welcome you.

By telling us that you have made future plans for Columbia, you become a member of the 1754 Society community and gain access to the unique people and experiences that Columbia offers.



To inform us, call Ryan Hart at (212) 851-7857 or email gift.planning@columbia.edu.

Considering planning for the future?

If so, contact us to begin the conversation or visit giftplanning.columbia.edu.

 COLUMBIA | 1754 SOCIETY

“
I’m planning my gift now
so that others like me can
study what they love and
make an impact.
”



Barbara Campagna
’86GSAPP
1754 Society member

Place
Stamp
Here

ATTN: Office of Gift Planning
Columbia University
622 W. 113th Street, MC 4518
New York, NY 10025

How can we optimize emails to best get the attention of our constituents?

Unlocking Email Open Rates: 12 Subject Line Tips

Create Uniqueness – Give Donors a Reason to Pause

Your donors are constantly bombarded with emails – many of which look, sound, and feel the same. To stand out, your subject line needs to **break the pattern**. When it feels fresh, unexpected, or thought-provoking, it triggers curiosity and encourages the reader to learn more.

In **planned giving**, that means moving beyond the usual phrases like “Planned Giving Update” or “Your Legacy Matters.” While accurate, those lines rarely excite. Instead, give your subject lines a creative twist that invites exploration while still aligning with your message.

Effective example:

Can I pay you for life?

Why it works:

- It’s surprising and a little provocative
- It introduces a benefit (payments for life) without giving too much away
- It teases a charitable gift annuity in an engaging way

Other strong options might include:

- *A smarter way to support what you love*
- *How a gift can pay you back*
- *Your IRA can do more than retire*

Guidelines for success:

- Be bold, but stay true to your audience
- Avoid misleading claims – uniqueness is about interest, not gimmicks
- Test subject lines that feel like a “new idea” or a lesser-known option (e.g., DAFs, beneficiary designations, CGAs)

**How does one address
planned giving
marketing to those
that don't understand
planned giving?**

What is planned giving anyway?



**IT'S
SIMPLE**



AND POWERFUL

It is a simple idea, yet a remarkably powerful one:

Education changes lives.

Making a planned gift can change the lives of students, and be one of life's most satisfying experiences.

Learn how a charitable gift, like a bequest to Bennington in your will or making Bennington a beneficiary of your IRA, can match your personal legacy goals.

Start today by downloading our FREE Estate Planning Guide from our **new planned giving website** at plannedgiving.bennington.edu/guide.

The planning you do today could change the lives of Bennington College students tomorrow. For further information, please contact:

Lauraine K. Goldberg
Senior Director of Planned Giving
Phone: 802-440-4367
Email: lgoldberg@bennington.edu

How much is too much planned giving communication?



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Know you donors



How to incorporate AI into our marketing efforts?

In what ways can we use this tool to maximize strategic marketing?

What is the most important thing a small shop should focus on with implementing a planned giving program?



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SUCCESS

Do They Know You Exist?



Legacy gifts provide the foundation for Quinnipiac University's work. These gifts allow you to take care of your family, provide for gifts to loved ones, and include a charitable gift for Quinnipiac University. We can help you find the best way to make your gift, and perhaps help you to make a larger gift than you thought possible.



Estate Planning Overview

When planning your estate, it's important to consider how you want your assets to be distributed. This includes your will, trusts, and other estate planning tools. We can help you understand your options and create a plan that meets your needs.

[Learn More](#)



Retirement Planning Tips

It's important to plan for retirement early. This includes understanding your current retirement savings and how much you need to reach your goals. We can help you create a retirement plan that works for you.

[Learn More](#)



Benefits of Giving

A gift plan can provide you with many benefits, including the ability to make a charitable contribution, receive a tax deduction, and support the work of Quinnipiac University. We can help you understand the benefits of giving and create a plan that meets your needs.

[Learn More](#)

Tell Me More

- ☐ I am interested in learning how to make a gift by will or trust.
- ☐ I am interested in learning about other options for including Cal Poly Humboldt in my estate plan.
- ☐ I have included Cal Poly Humboldt in my estate plan.

Name

Address (if changed)

City, State Zip

Email

Telephone

For confidentiality, fill in at least one, name, and address.

Cal Poly Humboldt FOUNDATION

1 Harpst Street, Arcata, CA 95521



Plan Your Legacy

Making a planned gift can change lives and be one of life's most gratifying experiences.

A charitable gift to Cal Poly Humboldt, like a bequest in your will or living trust, can match your personal legacy goals while helping us continue the Humboldt tradition of teaching, research, and learning. Your generosity will ensure that students experience our distinctive, hands-on education for generations to come.

By supporting Cal Poly Humboldt with your philanthropic donations, you support our efforts to provide a positive, meaningful educational experience.

To learn more about making a planned gift, contact the Foundation and Development Offices at giving@humboldt.edu or 707-826-5200.

The 1913 Legacy Society

The 1913 Legacy Society honors donors who have designated Humboldt in their estate plans and whose spirit of generosity will support future generations of students. Members of the Society are all donors who have designated Humboldt in their will, trust, or other planned gifts. Like Humboldt's original benefactors, members of the 1913 Legacy Society have made a vital commitment to the future of this institution.

Become a member of the 1913 Legacy Society today by telling us that Humboldt is designated in your estate plans.



Which types of marketing work best with different age groups?

Stages of Giving

- 21-54 Cash, Bequests, Beneficiary designations [simplicity of giving]
- 55-69 Appreciated securities, DAF, DCGA [retirement]
- 70+ Retirement assets, CGA, QCD, CRT. [legacy and tax avoidance]



**Would appreciate any
advice you have on
mailing lists and
segmentation of lists?**



YOUR
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GIVING
SUCCESS

Target indicators

The traditional planned giving indicators are:

Primary Planned Giving indicators:	Secondary indicators:
<ul style="list-style-type: none">- Frequency of giving- Longevity- Age- No heirs	<ul style="list-style-type: none">- Cumulative giving- Affinity to Institution- Capacity via wealth screen planned giving scores

Questions?



**To ask a question click the
Q&A button at the bottom**

Andrew Palmer
Senior Director of Marketing Services
apalmer@pgcalc.com