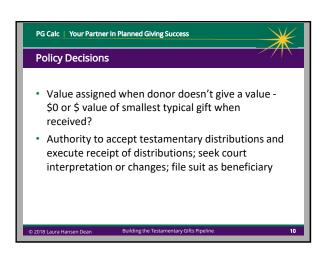
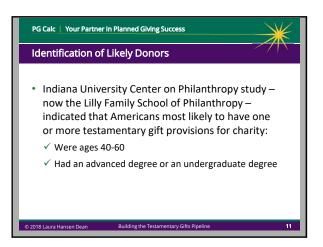




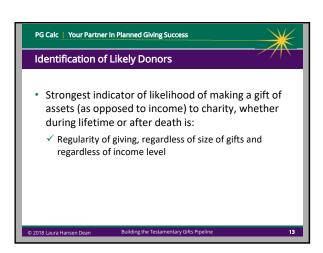


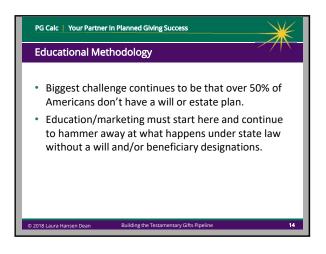
Policy Decisions Counting revocable bequests and beneficiary designations Counting irrevocable bequests where possible under state law Documentation requirements to count bequests and beneficiary designations in fund raising reports, campaigns, donor society membership





PG Calc Your Partner In Planned Giving Success Identification of Likely Donors Other studies have indicated that the arrival of one or more grandchildren changes estate planning priorities. Another study indicated that 25% of those 65 years old and older said that they would consider a testamentary gift to charity.

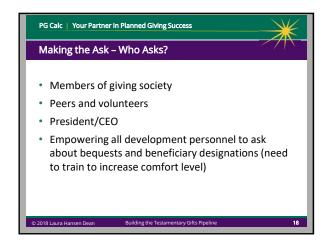


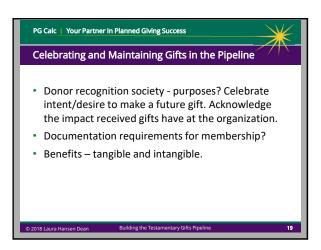


PG Calc Your Partner In Planned Giving Success Educational Methodology Publications and printed materials — move away from newsletters to shorter, more concise pieces to most loyal donors. Blackbaud study found that baby boomers — the largest group of current givers to charity — prefer e-mail marketing.

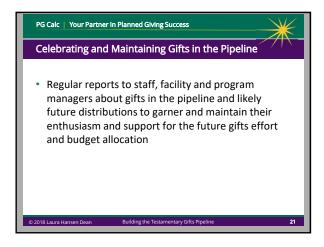
PG Calc Your Partner In Planned Giving Success Educational Methodology Age-segmented e-mail marketing has been successful for many charities. More traffic to website and more donors calling with questions after reviewing web site information. Phone calls to discover gifts in place or interest in learning more about life income and/or testamentary gifts.

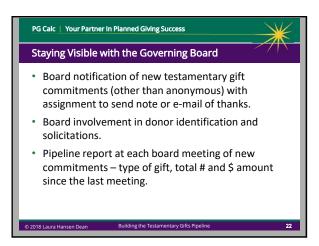
PG Calc | Your Partner In Planned Glving Success Educational Methodology Donor stories about gift motivations, gift decision process, gift option, desired impact through inperson testimonials, stories in publications, and videos. Social media marketing — give through will, name us as a beneficiary, get a life income, loan us assets, could all be options in the "Make a Gift" section.

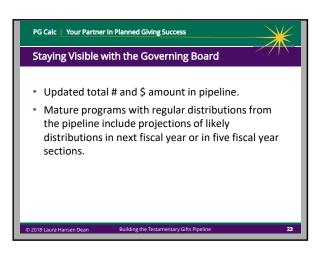












PG Calc Your Partner In Planned Giving Success Monitoring Probate and Non-probate Distribution • The average baby boomer has more assets in non-probate assets that pass outside the will and/or trust than will be distributed through the probate process: • Life insurance proceeds • Retirement plan and IRA balances • Jointly-owned property • Bank and brokerage accounts

Monitoring Probate and Non-probate Distribution Receiving life insurance proceeds and balances in bank and brokerage accounts can be fairly simple and quick. Receiving gifts from IRAs and retirement plans can be problematic because many custodians are treating these like assets inherited by surviving individuals instead of by charitable organizations.

Policy needs to authorize positions to accept and acknowledge receipt of distributions. Process needed to monitor receipt of testamentary gifts according to state law in timely manner. Audit regularly that gifts are credited to correct accounts and used as the donor intended. Building the Testamentary Gifts Pipeline 26



