Proposals that Stand Out: Adding Financial Illustrations to Blended Gift Requests

APRIL 2024
Overview of Blended Gift Requests

Gift Illustrations in Proposals

Discussing Proposals and Illustrations
PRESENTERS

CHRISTIANNA ROBERTSON, CFRE, CSPG
Senior Vice President
CCS Fundraising

HANNAH YARITZ, CSPG
Senior Vice President
CCS Fundraising
ABOUT CCS FUNDRAISING

Celebrating 75 years of transformational partnerships with nonprofits.

Leading experts in campaign and development strategy for 75 years

Experienced across nonprofit sectors and locations

Full-time professional staff plans, implements, and manages fundraising projects.
OUR SERVICES

FUNDRAISING CAMPAIGNS
INTERIM DEVELOPMENT MANAGEMENT
DATA ANALYTICS, SYSTEMS, & RESEARCH
ASSESSMENTS & AUDITS

STRATEGIC PLANNING
TRAINING & LEADERSHIP DEVELOPMENT
SYSTEMS PROJECTS
FEASIBILITY STUDIES
OUR EXPERIENCE
Overview of Blended Gift Requests
BLENDED GIFT REQUESTS

Blended gifts provide donors with an opportunity to impact an organization with both immediate and future gifts. These requests work to capitalize on the various types of assets held by donors and may address their concerns for current or future lifestyle obstacles.

Organizations with current and future philanthropic needs should prioritize blended requests when meeting with donors.
PROSPECT IDENTIFICATION

Key Demographics
- Age
- Marital status
- Legacy
- Longevity of giving
- Assets & wealth

Life Events
- Increase in assets
- Marriage / Divorce
- New child
- Death of spouse
- Sale of business
- Real estate sale

Assets to Include
- Cash
- Appreciated securities
- Qualified retirement assets
- Real estate
- Insurance policies
- Tangible assets
- Business interests

Gift Planning Vehicles
- Immediate use gifts
- Deferred gifts
- Split interest gifts
- Life income gifts
LIFE STAGE FRAMEWORK

Age Group
- Millennials 20s and 30s
- Mid-Career 40s
- Planning for Retirement 50s
- Retirees 60s+

Donor Focus
- Developing Philanthropic Vision & Mindset
- Planning for Future
- Income Needs (select donors)
- Executing Philanthropic Vision for Others

Planned Gift Vehicles
- Life Insurance - Cost Effective Solutions
- Estate Planning - Bequests and Retirement Plans
- Cash Gifts to Endowment
- Revocable Gifts including Retirement Plans incl IRAs
- Charitable Gift Annuities

Asset Types
- Cash
- Appreciated stock
- Property (real estate; royalty interest)
- Charitable trust

Additional Asset Types
- Life insurance
- Gift annuities and retirement plans
- Bequests
- IRA gifts
## Gift Vehicle Framework

<table>
<thead>
<tr>
<th>Metric</th>
<th>Outright Cash Gift</th>
<th>Outright Gift of Securities</th>
<th>Cash Gift from IRA</th>
<th>Charitable Gift Annuity</th>
<th>Bequest</th>
<th>Gift of Life Insurance</th>
<th>Charitable Remainder Annuity Trust</th>
<th>Charitable Remainder Unitrust</th>
<th>Gift of Retirement Assets</th>
<th>Charitable Lead Trust</th>
<th>Gift of Real Estate</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>If Your Goal Is To:</strong></td>
<td>Make a quick and easy gift</td>
<td>Avoid tax on capital gains</td>
<td>Make a quick and easy gift that's tax-wise</td>
<td>Receive fixed annual payments that are partially tax-free</td>
<td>Defer a gift until after your lifetime</td>
<td>Make a large gift with little cost to yourself</td>
<td>Secure a fixed life income while avoiding market risks</td>
<td>Create a hedge against inflation over the long term</td>
<td>Avoid the twofold taxation on IRA or other employee benefit plans</td>
<td>Reduce gift and estate taxes on assets you pass to children and grandchildren</td>
<td>Avoid capital gains tax on the sale of a home or other real estate</td>
</tr>
<tr>
<td><strong>Then You Can:</strong></td>
<td>Simply write a check now</td>
<td>Contribute long-term appreciated stock or other securities</td>
<td>Simply contact IRA administrator and ask to do a QCD to a charity</td>
<td>Create a charitable gift annuity</td>
<td>Put a bequest in your will (give a charity cash, specific property, or a share of the residue)</td>
<td>Contribute a life insurance policy you no longer need</td>
<td>Create a charitable remainder annuity trust</td>
<td>Create a charitable remainder unitrust</td>
<td>Name a charity as the beneficiary of the remainder of the assets after your lifetime</td>
<td>Create a charitable lead trust that pays income to a charity for a specific term of years</td>
<td>Donate the property to a charity or sell it to a charity at a bargain price</td>
</tr>
<tr>
<td><strong>And Your Benefits Are:</strong></td>
<td>An income tax deduction and immediate impact for a charity</td>
<td>A charitable deduction plus no capital gains tax</td>
<td>Reduce your taxes by reducing taxable income</td>
<td>Current and future tax savings on income taxes, plus stable payments</td>
<td>Donations that are fully exempt from estate tax</td>
<td>Current and possibly future income tax deductions</td>
<td>Tax benefits and often a higher rate of return</td>
<td>A variable income for life and tax benefits</td>
<td>The ability to leave your family other assets that carry less tax liability</td>
<td>Reduces your taxable estate and your family is able to keep the property</td>
<td>An income tax deduction, plus reduction or elimination of capital gains tax</td>
</tr>
</tbody>
</table>
STRATEGIC QUESTIONS

Clues for starting a blended gift conversation are...

What motivated your first gift to our organization? What inspires you to keep giving?

Thinking back on the philanthropic decisions you have made, what has brought you joy?

As you think about the future of (the people we serve, our planet, the arts, education, etc.) what are some of your worries? Hopes? What role do you see our organization playing in addressing these concerns (aspirations)?

What issues do you weigh when making decisions about your estate plans?

What do you hope to accomplish with your philanthropic investment? What impact do you think that investment could have on (our community, nation, world)?

Who should be part of a future conversation? Do you involve your family in decision making? Attorney? Financial advisor?
# Donor Meeting

<table>
<thead>
<tr>
<th>Donor Concern</th>
<th>Possible Gift Option</th>
<th>Introductory Talking Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Concerned they'll outlive their money</td>
<td>• Testamentary Gift</td>
<td>“Would you consider a pledge commitment that isn’t paid until you pass or when you no longer need it?”</td>
</tr>
<tr>
<td>• High health care costs</td>
<td>• Bequest Intention</td>
<td></td>
</tr>
<tr>
<td>• Want to provide for children's/grandchildren's college costs</td>
<td>• Gift Annuity</td>
<td>“Would you be open to exploring ideas to ensuring you have income sufficient to help your grandchildren with tuition while also helping our organization? We'd love to show you some ways you can keep funds available while committing to this effort.”</td>
</tr>
<tr>
<td>• Concerned they won't have enough to support retirement</td>
<td>• Gift Annuity, Testamentary pledge or Bequest Intention</td>
<td>“If we could show you a way to maintain or increase your income while also supporting your favorite charity, would you be interested?”</td>
</tr>
<tr>
<td>• Not enough cash right now</td>
<td>• Gift of tangible property</td>
<td>“Would you be interested in giving art to beautify our organization’s walls as part of the blended gift you are considering?”</td>
</tr>
<tr>
<td>• Has an extensive art collection</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Worried about retirement</td>
<td>• Multi-year pledge to gala</td>
<td>“Your continued commitment is so appreciated! Would you consider a multi-year pledge to ensure support for the gala and a significant campaign pledge that is fulfilled once your estate is settled?”</td>
</tr>
<tr>
<td>• Want to continue support of organization’s gala</td>
<td>• Testamentary pledge</td>
<td></td>
</tr>
<tr>
<td>• Inherited commercial real estate for retirement income which has become a burden</td>
<td>• A FLIP unitrust with the commercial real estate property</td>
<td>“Would you be interested in hearing how you could receive a steady stream of income while no longer managing the property and ultimate supporting our organization?”</td>
</tr>
</tbody>
</table>
Gift Illustrations in Proposals
BLENDING PROPOSALS

Current Needs
- Background information and context to request
- What need the donor’s gift will address

Vision & Goals
- Share vision of organization or project
- Articulate how donor can help achieve these goals

Gift Components & Illustrations
- Combination of gift vehicles
- Demonstrate benefit to donor and organization

Gift Impact
- Reiterate how support will strengthen the organization for the future
GIFT ILLUSTRATIONS

Blended gift illustrations provide suggestions of gifts of cash and non-cash assets in a manner that make tangible a larger gift commitment to the organization. Nonprofits can use an illustration to identify gift strategies that they anticipate might appeal to a donor. Illustrations might demonstrate:

• Gift options
• Income streams to donors
• Potential donor tax savings
• The benefit to the organization
SOFTWARE SUPPORTED

Donors give because they are emotionally connected to a cause. A gift illustration in a proposal helps to connect with a donor’s head and instills confidence in their giving. Illustrations can:

- Introduce complex planned gift concepts
- Offer charts, diagrams, and gift descriptions for greater understanding
- Resource donors with materials they can discuss with their financial planner(s)

<table>
<thead>
<tr>
<th>Amount</th>
<th>Cash Gift of $1M</th>
<th>Part Cash and Part Planned Gift of $2.5M</th>
<th>Part Cash and Part Planned Gift of $5.0M</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>CASH</td>
<td>CASH &amp; Charitable Lead Trust</td>
<td>CASH &amp; Charitable Remainder Trust</td>
</tr>
<tr>
<td>$1,000,000</td>
<td>$1,250,000 (Cash Gift)</td>
<td>$1,250,000 (Lead Trust)</td>
<td>$2,000,000 (Cash Gift) $3,000,000 (Remainder Trust)</td>
</tr>
<tr>
<td>Payout Percentage / Payment</td>
<td>N/A</td>
<td>5% / $62,500 to Nonprofit</td>
<td>5% / $150,000 annually to grandchildren</td>
</tr>
<tr>
<td>Charitable Deduction</td>
<td>$1,000,000 (if made in cash, 2021) (if use appreciated assets, 30% of AGI)</td>
<td>$2,404,106</td>
<td>$3,807,000 (can use $2M at 100% if funded with cash in 2021)</td>
</tr>
<tr>
<td>Taxes Owed</td>
<td>N/A</td>
<td>On income produced by trust, annually</td>
<td>Just on income (beneficiaries pay)</td>
</tr>
<tr>
<td>Payments to Family</td>
<td>N/A</td>
<td>N/A Assets returned in Yr. 20</td>
<td>$1,080,000 (after tax)</td>
</tr>
<tr>
<td>Other Benefits</td>
<td>Organization receives immediately</td>
<td>Organization receives annual payments over 20 years</td>
<td>Bypass capital gains taxes</td>
</tr>
</tbody>
</table>
MANUAL CALCULATION

While gift illustration software is helpful, it's not required to create impactful proposals. If you don't have software, simplify illustrations.

Show estimated amounts that are illustrative and that exemplify the type of savings a donor could enjoy. Utilize simple math with federal tax rates to demonstrate how a donor at X income level could enjoy tax savings like Y.

Working in generalities is fine as it prompts thought for the donor to consider giving beyond cash.

EXAMPLE: If demonstrating amounts isn't possible, share why, based on the donor's general age, a CRT or bequest or some other vehicle might be worth their consideration.

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash Gift Amount</td>
<td>$1,000,000</td>
<td></td>
</tr>
<tr>
<td>Fair Market Value of Assets</td>
<td>$100,000</td>
<td></td>
</tr>
<tr>
<td>Cost Basis</td>
<td>$25,000</td>
<td>What the donor originally paid</td>
</tr>
<tr>
<td>Income Tax Bracket</td>
<td>24%</td>
<td></td>
</tr>
<tr>
<td>Potential Charitable Deduction</td>
<td>$1,100,000</td>
<td>• Deductible up to 60% of AGI</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Deductible up to 30% of AGI for appreciated property over 1-year</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Unused amount may be carried over up to five-years</td>
</tr>
<tr>
<td>Potential Income Tax Savings</td>
<td>$264,000</td>
<td>Based on donor's tax bracket</td>
</tr>
<tr>
<td>Capital Gains Tax Elimination</td>
<td>$11,250</td>
<td>• Based on long-term capital gains rate of 15% on the difference of your cost basis and the FMV</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Assumes gift of appreciated real estate or marketable securities</td>
</tr>
</tbody>
</table>
CASE STUDY
OVERVIEW: A LOYAL DONOR

Donor
- Founding member of an organization
- Widow in her mid-seventies
- Plans to move in the coming years

Giving
- Makes regular contributions for over 35-years (including a capital campaign pledge)
- Recently began giving through qualified retirement plans
- Giving decreased over the years, some years does have an increase of contributions
- Supports other causes (amount unknown)

Wealth/Assets
- Owns real estate properties, including a rental investment property
- Management of rental has become a burden
- Plans to move in the coming years
OVERVIEW: STRATEGY

• Donor attended prior gift planning seminar, engaged

• Blended gift request could support a planned gift request

• Goal to increase annual support and aspirational gift of non-cash assets

• Endowment to support her annual contribution may appeal

• Prior capital campaign gifts, but no campaign currently

• Deferred maintenance = future cost
A Legacy for Fundraisers

A Special Proposal Prepared for Margaret Johnston
Margaret,

You have been a loyal supporter to our organization for many years. Your generosity has helped us reach a wider audience. We would like to share with you an exciting opportunity to make a significant impact through our mission. In recent years our organization has grown considerably to meet the needs of our community. With this growth comes a need to sustain our operations now and into the future. Thank you for your continued support and for considering a gift to our organization to further our mission.

This year has been one of our most exciting to date. We have grown our membership ten percent. Along with this growth has been an increase in the services we offer. Our Roundtable has always been a featured event for many gift planners in our region. In recent years we have also seen significant growth in participation in our monthly webinars as well as our in-person networking events. With this growth has come added costs that have not been fully covered in our membership growth.

On the heels of this growth, we would like to share with you a few pillars for our future growth. Our vision is to make a permanent impact in this community. Last year we updated the Master Plan for our organization that details a ten-year growth plan including additional services we plan to provide our membership.
Furthering Your Support

Your continued ongoing support makes a meaningful difference in the programming we offer throughout the year. Your asset-based gift will work to ensure CPGR sustains its mission in support of impacting fundraising professionals for years to come.

<table>
<thead>
<tr>
<th>Continuing your personal impact</th>
<th>$6,000 cash</th>
<th>Impact: Sustain high-quality educational programming and networking for gift planning professionals.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Benefits to You: Potential income tax deductions, credits, or avoidance of capital gains taxes.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sustaining CPGR for the Future</th>
<th>$150,000 real estate</th>
<th>Impact: Build our long-term vision to be the best Gift Planning organization in the Mountain West.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Benefits to You: Different gift vehicles may avoid capital gains tax, provide income tax deductions, lifetime income or other benefits.</td>
</tr>
</tbody>
</table>

**FUNDRAISER NOTE:**
- Clearly articulate combination of gift vehicles
- Demonstrate benefit to donor and organization
Thank You, Margaret.

We are grateful for your support and want you to know the impact it has makes. A gift of $6,000 makes a significant contribution to our operations. Membership dues only cover a portion of our mission. The generosity of donors like you currently covers 55% of our operating costs including cost of programming and networking events.

A legacy gift could help us to sustainably grow our impact and plan for the future. We are seeking to raise $4,000,000 in endowment to support our operations growth. In recent years we were reminded that changes in annual giving can have large impacts in our organization’s operations. We seek endowment funds that will provide permanent funding for twenty-five (25%) of our operating costs to provide revenue stability.

We are honored to have you as part of our CPGR family and appreciate your consideration of supporting our future.
<table>
<thead>
<tr>
<th>Donor Benefits</th>
<th>Direct Gift of Real Estate</th>
<th>Bequest</th>
<th>Retained Life Estate</th>
<th>Charitable Trusts (CRAT, CRUT, CLAT, CLUT)</th>
<th>Charitable Gift Annuity (CGA)</th>
<th>Donor Advised Fund (DAF)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Allows large gift; Sale of real estate handled</td>
<td>Gift when your estate is settled; Easy to incorporate to your current will or trust</td>
<td>You can reside in property while transferring ownership to CPGR</td>
<td>Greatest flexibility to design gift and control investments; Receive Income (CRAT &amp; CRUTS); Receive Remainder (CLAT &amp; CLUT)</td>
<td>Provides you stable income for life, ensured by CPGR</td>
<td>You control gift timing; Option to support other organizations</td>
</tr>
</tbody>
</table>

**FUNDRAISER NOTE:**
- Providing a ‘leave-behind’ with more information can be beneficial
- ALWAYS remind the donor to seek advice from their professional advisors

<table>
<thead>
<tr>
<th>Potential Tax Opportunities</th>
<th>Income Tax Deduction; Avoid Capital Gains Tax</th>
<th>Reduce Estate Tax</th>
<th>Partial Income Tax Deduction; Avoid Capital Gains Tax</th>
<th>Income Tax Deduction; Avoid Capital Gains Tax</th>
<th>Reduce Estate Taxes</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Organization Benefits</th>
<th>Receives a large immediate gift</th>
<th>Receives a large deferred gift</th>
<th>Irrevocable</th>
<th>Often used for larger gifts</th>
<th>Scalable, to provide regular income</th>
<th>Identify prospects with giving strategy</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Limitations</th>
<th>Must give full amount of property to organization</th>
<th>Must give full amount of property</th>
<th>Irrevocable, Trust cannot be changed once created</th>
<th>Fixed terms set by organization</th>
<th>Similar flexibility to foundation</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Appraisal Required?</th>
<th>Yes</th>
<th>No</th>
<th>Yes</th>
<th>Yes</th>
<th>Yes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Additional Costs</td>
<td>Lawyer Fees</td>
<td>Lawyer Fees</td>
<td>DAF Fees</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Appraisal Required?</th>
<th>Yes</th>
<th>No</th>
<th>Yes</th>
<th>Yes</th>
<th>Yes</th>
</tr>
</thead>
</table>
A Legacy for Fundraisers

Gift Illustrations Prepared for Margaret Johnston
Margaret,

Gifts of Real Estate provide donors like you the opportunity to turn assets that have been part of your daily life into a gift that benefits others.

The illustrations provided in this document demonstrate the how real estate can be used to impact CPGR. The gift strategies may have benefits to you in addition to our mission. The gift strategies we have included are:

1. Sale of Real Estate & Charitable contribution
2. Direct Gift of Real Estate
3. Donor Advised Fund
4. Charitable Gift Annuity
5. Charitable Remainder Trusts

We are honored you are considering making such a thoughtful contribution so the Colorado Planned Giving Roundtable can thrive now and into the future.

FUNDRAISER NOTE:

• Remind donor that these illustrations are for informational purposes and should not replace the advice of personal professional advisors.
• Offer to join professional advisor conversations.
Option 1

Real Estate

Sale of Real Estate & Give Annually

<table>
<thead>
<tr>
<th>Estimated Property Value</th>
<th>$130,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Closing Costs</td>
<td>($10,000)</td>
</tr>
<tr>
<td>Capital Gains Tax (15%)</td>
<td>($15,000)</td>
</tr>
<tr>
<td>State Cap. Gains (6.8%)</td>
<td>($6,800)</td>
</tr>
</tbody>
</table>

Sale Proceeds                  $98,200

Proceeds from the property sale could be used to support your ongoing commitment to CPGR, or support CPGR’s vision for the future.

Note: Illustrations are an example, seek input from a professional advisor.
Option 2

Gift Real Estate

Transfer Property Deed to CPGR

<table>
<thead>
<tr>
<th>Estimated Property Value</th>
<th>$130,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Closing &amp; Appraisal Costs</td>
<td>($10,800)</td>
</tr>
<tr>
<td>Sale Proceeds for CPGR</td>
<td>$119,200</td>
</tr>
</tbody>
</table>

Additionally, the sale could provide you tax benefits:

<table>
<thead>
<tr>
<th>Income Tax Deduction</th>
<th>Avoid Cap. Gain Tax</th>
</tr>
</thead>
<tbody>
<tr>
<td>$28,600 (federal)</td>
<td>$15,000 (federal)</td>
</tr>
<tr>
<td>$8,840 (state)</td>
<td>$6,800 (state)</td>
</tr>
</tbody>
</table>

Note: Illustrations are an example, seek input from a professional advisor.
## Gifts Considerations:

- **DAFs provide flexibility to grow contributed assets, direct grants, and name a charitable beneficiary**
- Contributing property to establish a DAF may provide tax benefits:
  - $15,000 estimated federal *capital gains tax* savings
  - $6,800 estimated state *capital gains tax* savings
  - $28,600 estimated federal *income tax* deduction
  - $8,840 estimated state *income tax* deduction

### Funds Available to Gift:

<table>
<thead>
<tr>
<th>Estimated Property Value</th>
<th>$130,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Closing Costs</td>
<td>($10,000)</td>
</tr>
<tr>
<td>DAF Fee</td>
<td>($10,000)</td>
</tr>
<tr>
<td><strong>Adjusted Value</strong></td>
<td><strong>$110,000</strong></td>
</tr>
</tbody>
</table>

### Gift Considerations:

- **Charity**
  - Year 1: $6,000
  - Year 2: $6,000
  - Year 3: $6,000
  - ... Year 10: $6,000

- **Charity**
  - **Termination**
  - **Charitable Gift:** $101,949

**Note:** Illustrations are an example, seek input from a professional advisor.
Charitable Gift Annuity

Gift Considerations:
CGAs provide you with income for life (or a term of years), while leaving the remainder to CPGR.

An income tax deduction will likely be allowed for the present value of the amount gifted to CPGR at termination:
- $12,810 estimated federal tax savings
- $3,960 estimated state tax savings

At termination, the CGA is estimated to make a $60,000 impact on CPGR

Our current payment rates are 6.4%
Gift Considerations:

You have the option to select an annual (fixed) or percentage payment of 5–50% of the total assets in the trust.

You will likely avoid the entire capital gain tax both federal $15,000 and state $6,800.

You may receive an income tax deduction on the present value estimated to be given to CPGR.

- $16,264 in federal income tax savings
- $4,959 in state income tax savings

Assuming the trust earns 5.5% over time and pays out at 5%, the remainder would make an extraordinary impact on CPGR.

<table>
<thead>
<tr>
<th>Year</th>
<th>Amount</th>
<th>Charitable Remainder Trust</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiation</td>
<td>Recognized Gift: $120,000</td>
<td>Tax Deduction</td>
</tr>
<tr>
<td>Year 1</td>
<td>$6,000</td>
<td>Payout of 5%</td>
</tr>
<tr>
<td>Year 2</td>
<td>$6,000</td>
<td></td>
</tr>
<tr>
<td>Year 3</td>
<td>$6,000</td>
<td></td>
</tr>
<tr>
<td>…</td>
<td>…</td>
<td></td>
</tr>
<tr>
<td>Year X</td>
<td>$6,000</td>
<td></td>
</tr>
<tr>
<td>Termination</td>
<td>Charitable Gift: $135,350</td>
<td></td>
</tr>
</tbody>
</table>

Note: Illustrations are an example, seek input from a professional advisor.
Thank you, Margaret!
Discussing Proposals and Illustrations
Preparation is critical for successful meetings with donors, partners, and advisors.

- Know prospect and background information
- Review and understand case and gift impact
- Outline meeting objectives
- Strategize potential outcomes and associated next steps
- Determine any steps to prepare associated partners
- Practice your talking points and responses to potential questions that may arise during meeting
DONOR MEETING

Donor and their family/loved ones

- Emphasize impact on organization
- Highlight benefits of their support and how various gift options also benefit the donor
- Use plain, clear language
- Open door for participation in future conversations with donor’s family and/or professional advisors
- Be prepared to offer additional gift illustrations based on information learned
Technical Expert, Financial Professional, Attorney

- Work to make sure your organization is an easily accessible resource for information
- Demonstrate your expertise by showing how various gift options may make an impact at the organization

Advisor Point of View:
- Is this in my client’s best interest? Will this maximize their investments?
- How will you (charity) work with my client?
- Can I trust you?
PARTNER MEETING

Executive Director, Other fundraisers, Finance Team

• Joining meeting? (CEO, Fundraisers)
  • Relay background information and relevant research
  • Assign specific roles
  • Review talking points
  • Strategize potential responses and next steps

• Approval of gift acceptance? (CEO, Finance)
  • What do GAPs say?
  • Special considerations – UBIT, timing, ethics
  • Recognition options

• Supporting documentation? (CEO, Finance, Operations)
  • Relay relevant background information
  • Determine what information they need from donor/advisor to document and book gift according to organization policies
CLOSING THOUGHTS & REACTIONS
In understanding the importance of asset-based giving...

In preparing for and asking for blended gifts...

To build and talk about gift impacts, utilizing illustrations as a tool...

To make your next ask, a blended request utilizing asset-based fundraising principles...