**PLANNED GIVING STRATEGY**

**OVERVIEW**

ABC Organization is undertaking a campaign to establish an endowment to help secure the long range financial needs of ABC .

The non-designated fund will receive bequests, memorials and special gifts. The fund will be used primarily to support future operating and scholarship expenses ABC.

Donors may also establish designated funds, subject to the approval of the ABC Board.

**FIRST YEAR EMPHASIS**

During the first year, direct gifts and bequests will be emphasized as giving vehicles. Sources might include:

* Cash
* Securities
* Real Estate
* Life Insurance designations

In subsequent years additional, more complex vehicles will be introduced:

* Charitable Remainder Annuity Trusts
* Charitable Remainder Unitrusts
* Charitable Lead Trusts
* Pooled Income Funds

**USE OF FUNDS**

It is the intent that the principal of the Endowment Fund will not be invaded.

The ABC Board will draft and adopt a fund use policy.

A "total return" policy will be followed:

* No more than 5% of the total assets of the Endowment Fund may be allocated annually for ABC use.
* Allocation for subsequent years will be determined based on total assets of the Fund as of December 31.

**Initial Goals**

Growth of the endowment to at least $50,000 by the end of year 2020; $100,000 by 2023; and $250,000 by 2030.

**Strategy**

The planned giving program consists of the following components:

1. Recruitment of a volunteer Planned Giving Advisory Council composed of experts in the field

Members will include:

* A representative of the ABC Board
* Tax attorney
* Tax Accountant
* Real estate agent
* Investment broker
* Certified financial planner
* Trust banker

2. A list of the top 25 key prospects will be prepared.

Key prospects will include:

* ABC clients and their families
* Current and past ABC Board members and staff
* Prominent area families
* Select area individuals and companies

3. Key prospect analysis and research will be conducted:

* Demographics
* Sociographics
* Prospect profiles
* Individual prospect information
* Benefits to prospects

**TIMETABLE**

December, 20

\* ABC Board adopt plan

\* Draft and design marketing materials

\* Recruit initial Planned Giving Advisory Council members

January, 20

\* Board adopt fund use, investment and donation acceptance policies (see Investment Policies document)

\* Prepare recognition plan

\* Print planned giving marketing materials

\* Prepare planned giving prospect lists

\* Solicit Board pledges and contributions

\* Develop key planned giving prospect strategies

\* Prepare planned giving information packets for mailing

March

\* Introduce planned giving program

\* First selected planned giving prospects mailing

\* Mailing to financial professionals

\* Begin personal contacts with key planned giving prospects

April ----->

\* Prospect follow-up

**DRAFT INITIAL PLANNED GIVING BUDGET**

Brochure design $ 1,500.

Printing 350.

Postage 150.

Contact letter, copying 45.

Response envelopes 100.

\_\_\_\_\_\_

$ 2,145.

**DRAFT CONTACT LETTER - FINANCIAL PROFESSIONALS**

Name

Address

Address

Dear \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_:

Enclosed for your files is information about ABC Organization, Inc..

An endowment has been established to help secure the financial future of ABC.

Log on to our website for additional information and legal designations.

Please contact me if I can provide additional details for your clients who might be interested in considering a planned gift or bequest to ABC.

Cordially,

President

Date

ENCLOSURES:

\* 1-page ABC fact sheet

\* ABC brochures

\* Annual report

\* List of ABC Board members, Advisory Council