

Planned Giving 101

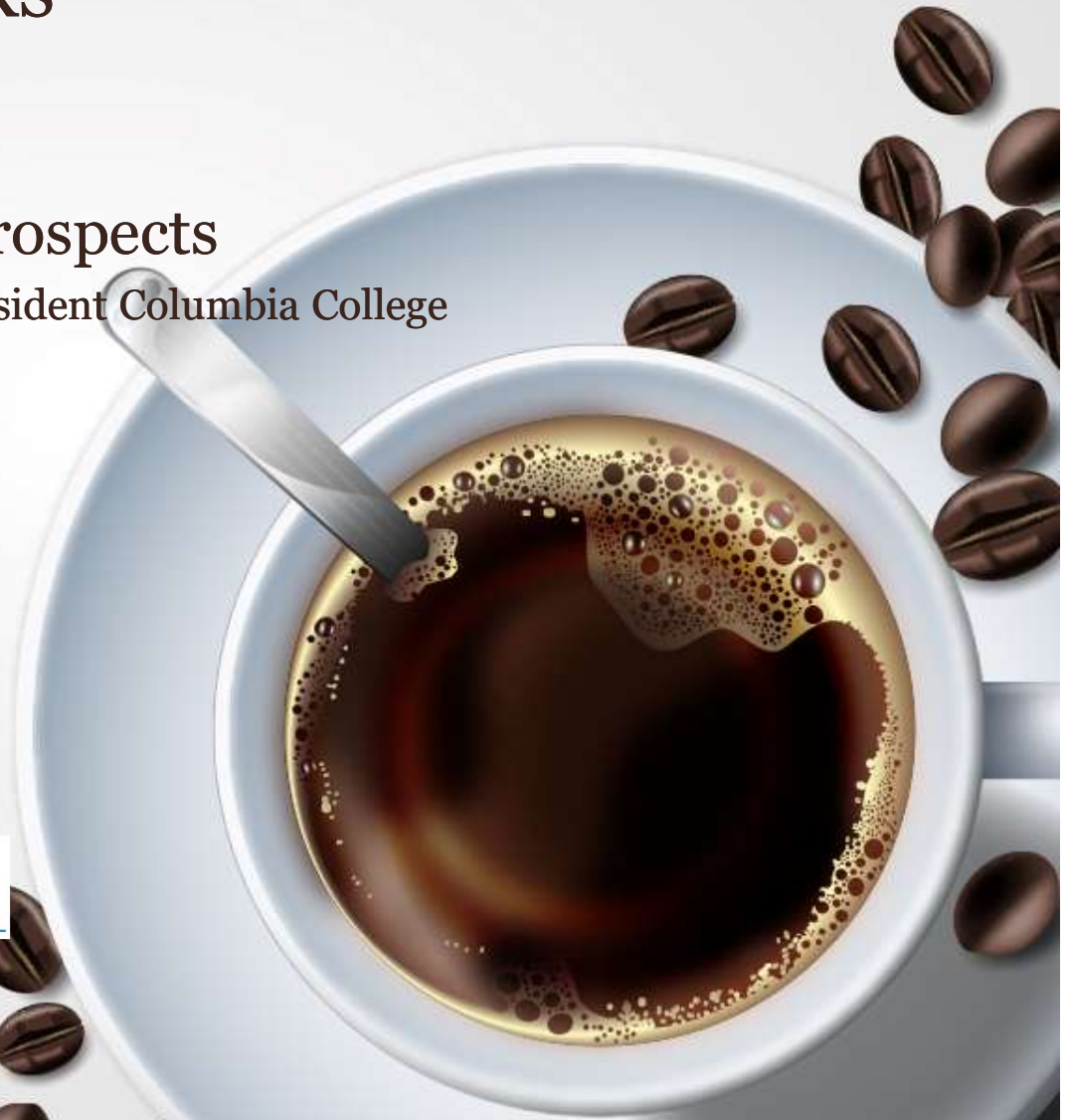
Virtual Coffee Talks

Understanding Your Donor:

Identifying Planned Giving Prospects

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October 8, 2020



Why Planned Giving is Attractive for Donors



Part of search
for meaning
& significance

Enables
significant
giving

Transfers
values to
heirs

Protects
financial
security

Unlocks
value from
illiquid
assets

Reduces tax
burden

Provides
financial
benefits

Diversifies
inheritance



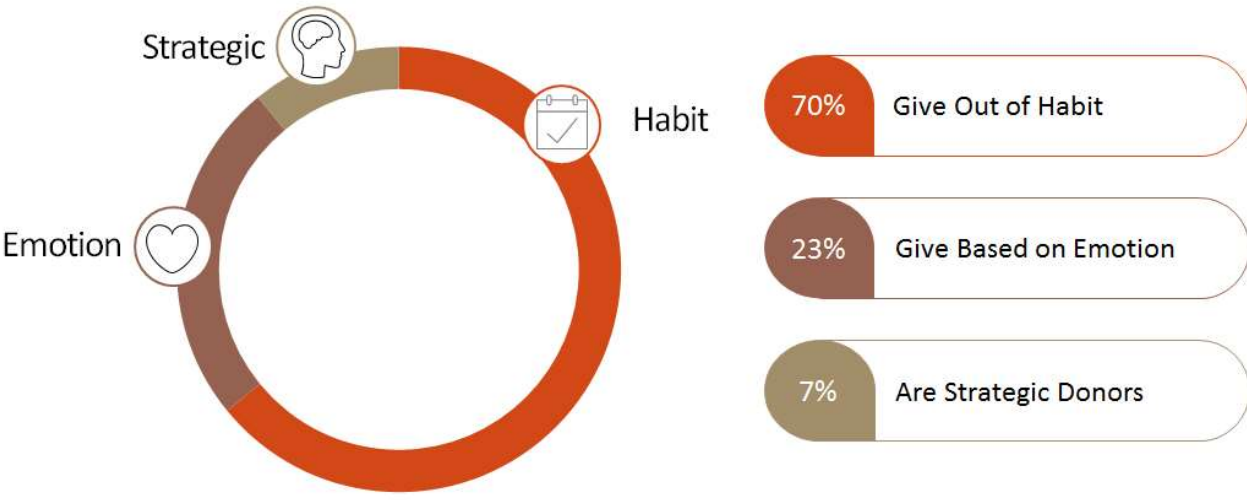
Why Planned Giving is Attractive for Donors

Planned Gifts:

- Helps those who need our help
- Brings great joy and satisfaction to those who give
- Are a great way to memorialize a loved one
- Are a great way to honor a loved one
- Are an excellent way to teach philanthropy to our heirs
- Are often used to help those we love with income:
 - Children
 - Grandchildren
 - Special needs trust
 - Siblings



Three Types of Donors



Who are they?

1. Have a desire to make a difference and give during their lifetime
2. Don't have a current estate plan, or are confused by the one they have
3. Have an estate plan that doesn't reflect their values
4. Gives regularly to your organization
5. Extremely loyal to your organization



Who are they?

6. Are personally involved with your work
7. Have had a life-transforming experience with your organization
8. Have made a charitable estate gift, but not in the most tax-advantaged way
9. Are strategic in their living and giving – and expect your organization to do the same
10. Are personally involved with your organization – devote much of their time to “keeping you on track”
11. Have significant personal wealth with complex planning needs



Who are they?

- Singles without children
- Couples without children
- Singles with successful children
- Couples with successful children
- Individuals who are fearful to leave a large inheritance to their children
- Individuals who believe that their children do not need a large inheritance
- Individuals who built their wealth in unrealized income assets
- Blended families



Identifying Prospects

The best way is through conversations!!!

- There are short cuts, but they aren't very productive
- They look at net worth or ability
- The most indicative information is not someone's ability
- Look for PROPENSITY!
 - I would rather have someone with a propensity to give than someone who has the ability to give!
 - AWESOME if you can find both a propensity and ability to give!!
 - You might find out someone has the ability to give to organizations through research, BUT it takes conversations to know if a donor has the propensity to give a planned gift to YOUR organization

