

Unlock Your Transfer of Wealth™

What is it?

LOCUS' **Unlock Your Transfer of Wealth™** analysis provides a reasonable estimate of the total household wealth that will transfer from one generation to the next over a given period, *10 years or 50 years*, in a defined geography – *typically a city, county or state*. While past research has found that most of this wealth will be passed on to heirs, there is growing evidence of individuals and families giving back to their communities, keeping some of that wealth in the places they call or have called home.



What value does it provide?

Estimating a region's Transfer of Wealth™ is the first step to unlocking it. **Healthy and vibrant places take investment** – investment in schools, affordable housing, main street businesses, hospitals, food markets and more. Business, government and philanthropy need the capital and the skills to make these investments. As communities search for investment dollars, their transfer of wealth represents a significant potential answer. LOCUS' **Unlock Your Transfer of Wealth™** analysis helps place-focused foundations like community foundations estimate the assets from which charitable giving and philanthropic investing could be realized.

When is **Unlock Your Transfer of Wealth™** the *right* solution?

Community foundations and regional associations of grant makers use **Unlock Your Transfer of Wealth™** analysis to support numerous development, planning and advocacy activities. It can be used as a visioning tool to help communities and regions overcome the perception that they lack the assets to change things for the better. Simply communicating the scale of a region's Transfer of Wealth™ can **prompt neighbors to start dreaming about what might be possible**. The report can be used as a strategy development tool to help foundations grow planned giving programs and unrestricted endowment in addition to more traditional donor-advised development programs. Finally, it can be used as a policy tool to help regional associations promote legislation and regulations that incentivize community endowments and charitable giving.

How has it been used most effectively?

In 2002, the Nebraska Community Foundation used their first Transfer of Wealth™ study as a call to action, encouraging community residents to giveback “just 5%” to endowments benefiting their home communities. At the time, the foundation had just 18 planned gifts totaling \$6 million. Today, the foundation has 307 planned gifts worth \$61 million. In the last decade, NCF has almost quadrupled the foundation's endowed assets and has 219 affiliated funds serving 250 communities in 80 counties.

How can I learn more about LOCUS?

To learn more about LOCUS' solutions and tools, please contact **Sydney England** at sydney@locusimpactinvesting.org or at 804.793.0985.