

Building Planned Giving into any Development Program



2019 Petrus Leadership Conference
June 23-26 | Oklahoma City, OK



What is a planned gift?

A contribution where provisions are made in the present and given at a future date.



2 General Categories of Planned Gifts

- Outright Gifts (non-cash)

- Gifts that utilize legal and tax strategies to maximize giving

Examples:

- Appreciated securities
- Qualified Charitable Distributions (IRA Rollover)
- Closely held business interests
- Other non-cash gifts
- Charitable Trusts/Charitable Gift Annuities

- Estate Gifts

- Gifts that come to fruition at the end of life

Examples:

- Bequests
- Payable/Transfer upon death
- Beneficiary Designation
- Charitable Trusts/Charitable Gift Annuities



#1 Misconception



Only big organizations can do planned giving



WHY add a planned giving component?



Shifting mindset from giving cash to giving assets



An estate gift is often times the largest gift anyone will give



The Facts



Charitable bequests accounted for about 10% of individual giving (Giving USA Foundation, 2018)



99% of financial assets are held in a form not accessible by writing a check. (Visual Planned Giving, Dr. Russell James III)



Planned gift sources



#1 Bequests (wills/trusts)



#2 Life Income Gifts
(Largely CRTs and CGAs)



#3 Life Insurance, IRAs,
Retirement Accounts



#4 Everything else (real
estate, business
interests, etc.)





What are your
challenges?



Step #1

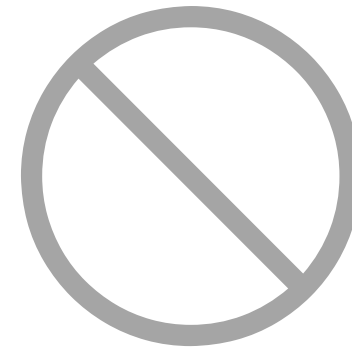
Commit for the long-haul



Avoid the Biggest Mistakes



Do nothing



Start, then Stop



Step #2 - Learn



Websites for organizations with successful programs



Free Webinars are EVERYWHERE (Crescendo, Stelter, PlannedGiving.com)



Community Foundation Email Lists



Visual Planned Giving by Dr. Russel James III



Professional Advisors



Estate Planning Councils, Leave a Legacy, Planned Giving Round Table or other Societies in your city



Step #3 - Planning



DEVELOPMENT
COMMITTEE



WHAT KIND OF GIFTS WILL
YOU ACCEPT?



HOW WILL YOU START
TALKING ABOUT THESE
GIFTS?



DO WE KNOW ABOUT
ANY PLANNED GIFTS?



Step #4 - Communication Integration!



NEWSLETTER



WEBSITE



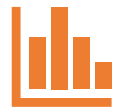
E-NEWSLETTER



FACEBOOK



BULLETIN



ANNUAL
REPORT



What to communicate?

“Your light must shine before all so that they may see goodness in your acts.” (Matthew 5:16)

We should view our giving in gratitude to God by considering how blessed we are...using our gifts and talents for the good of others. A gift in any amount given through your estate will benefit future generations of the faithful. For more information on naming [MY ORGANIZATION] in your estate plan, please call [PERSON] at [PHONE NUMBER] or visit [WEBSITE.COM/LEGACY].



Step #5 - Network of Professional Advisors



CERTIFIED PUBLIC
ACCOUNTANT (CPA)



ESTATE PLANNING
ATTORNEY



CERTIFIED FINANCIAL
PLANNER (CFP)



TRUST OFFICERS



INSURANCE AGENTS



Who makes planned gifts?



DONORS FOR 10+ YEARS



25+ GIFTS



VOLUNTEERS



BOARD MEMBERS



DONORS WHO HAVE GIVEN ASSETS



Prayerfully consider the
Church as one of your
children in your estate plan



Estate of \$1 Million



CHILD 1
\$250,000



CHILD 2
\$250,000



CHILD 3
\$250,000



CHILD 4
\$250,000



Estate of \$1 Million



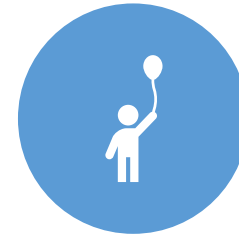
CHILD 1
\$200,000



CHILD 2
\$200,000



CHILD 3
\$200,000



CHILD 4
\$200,000



CHARITY
\$200,000

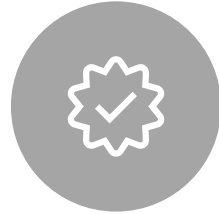
Consider ministry as one of your children



Retaining and Maintaining: Legacy Society



CREATE AND
PROMOTE THE
LEGACY SOCIETY



NAME IT
SOMETHING
UNIQUE



FOCUS ON
ENGAGEMENT



RECOGNITION AND
GRATITUDE



COMMUNICATION



CALL/VISIT



ASK THEM TO WRITE
A TESTIMONIAL!



Blended Gift

Example 1

- Qualified Charitable Distribution (QCD) during life
- IRA Beneficiary Designation at passing

Example 2

- Annual Fund Gift of \$5000
- Planned endowment gift of \$100,000 to replace annual giving (5% spend per year)



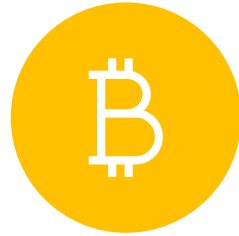
The Charitable Swap



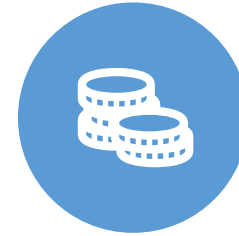
GIVE APPRECIATED
STOCK TO CHARITY



AVOID CAPITAL GAINS
TAXES



REBUY STOCK USING
CASH



RESET COST BASIS



RESULT: DONOR GETS
TAX BENEFITS AND
CHARITY GETS A GIFT



Your next steps

1. Commit
2. Learn
3. Build your network
4. Start asking/communicating
5. Continue to steward



Questions?

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