

Understanding the Major Trends That are Impacting Donors Today... and Tomorrow!

How shifts in donor behavior are impacting nonprofit outreach

The HARD TRUTHS of Planned Giving

2/3 of “realized” planned gifts are unknown at time of receipt

Planned giving decisions are based on a donor’s timeline, not ours!

Donor’s decisions are 57% completed BEFORE ever reaching out to you

1

**Why Are We Seeing
This Change?**

2

**Understanding
Today's Donor**

3

**What Does This
Mean For You?**

1

Why Are We Seeing This Change?

Demographic Shift

- PG largely grown on back of the Great & Silent Generations
- Boomers think differently, act differently



Matures (Born 1925-1945)

Matures Values:

- » Hard work
- » Fiscally conservative
- » Respect for authority and formal rules
- » High value for education
- » Value on the 'greater good' over themselves
- » Trust in charity



Boomers (Born 1946-1964)

Boomers' values:

- » Optimism
- » Work ethic
- » Challenge the status quo: "Never trust anyone over 30"
- » Explosion of Television and broader access to information
- » Personal gratification (The "Me" Generation)



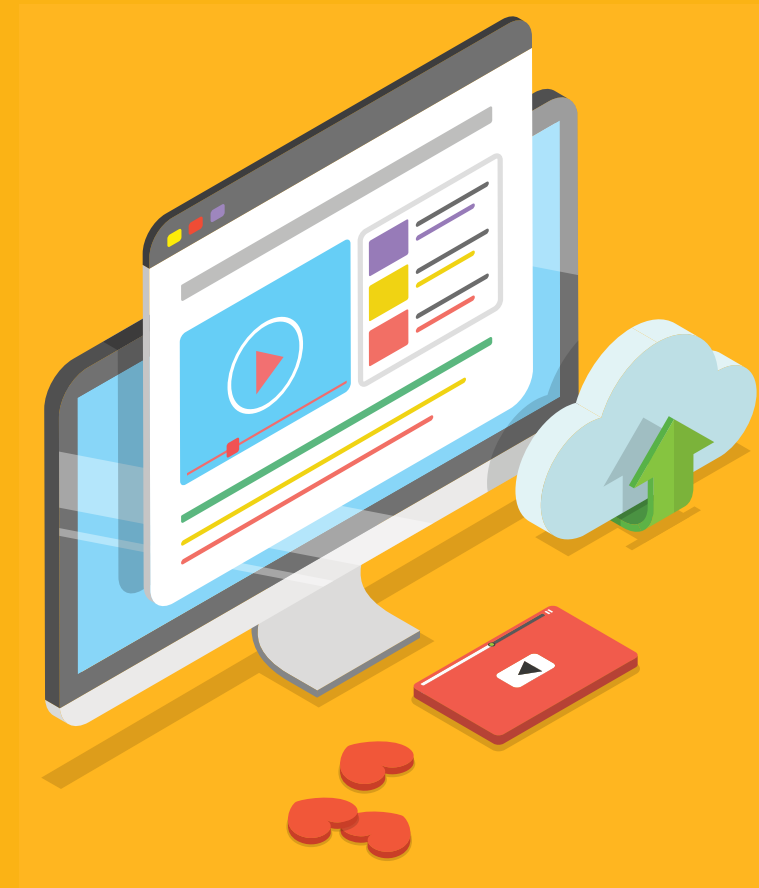
Why Boomers?

- » Comprise 39% of US adult population
- » Control 80% of the wealth in the US
- » Give 50% of individual philanthropic giving
- » Are one-third more generous than Matures at the same age
- » Will maintain wealth inequity for the next 20 years (don't retire at 65)



Generational Similarities

- » Attach the same importance to donating to charity
- » Both volunteer with nonprofits at the same rate
- » No significant difference in percentage by generation of those who have left a gift to a nonprofit in their will
- » Both concerned about outliving their wealth

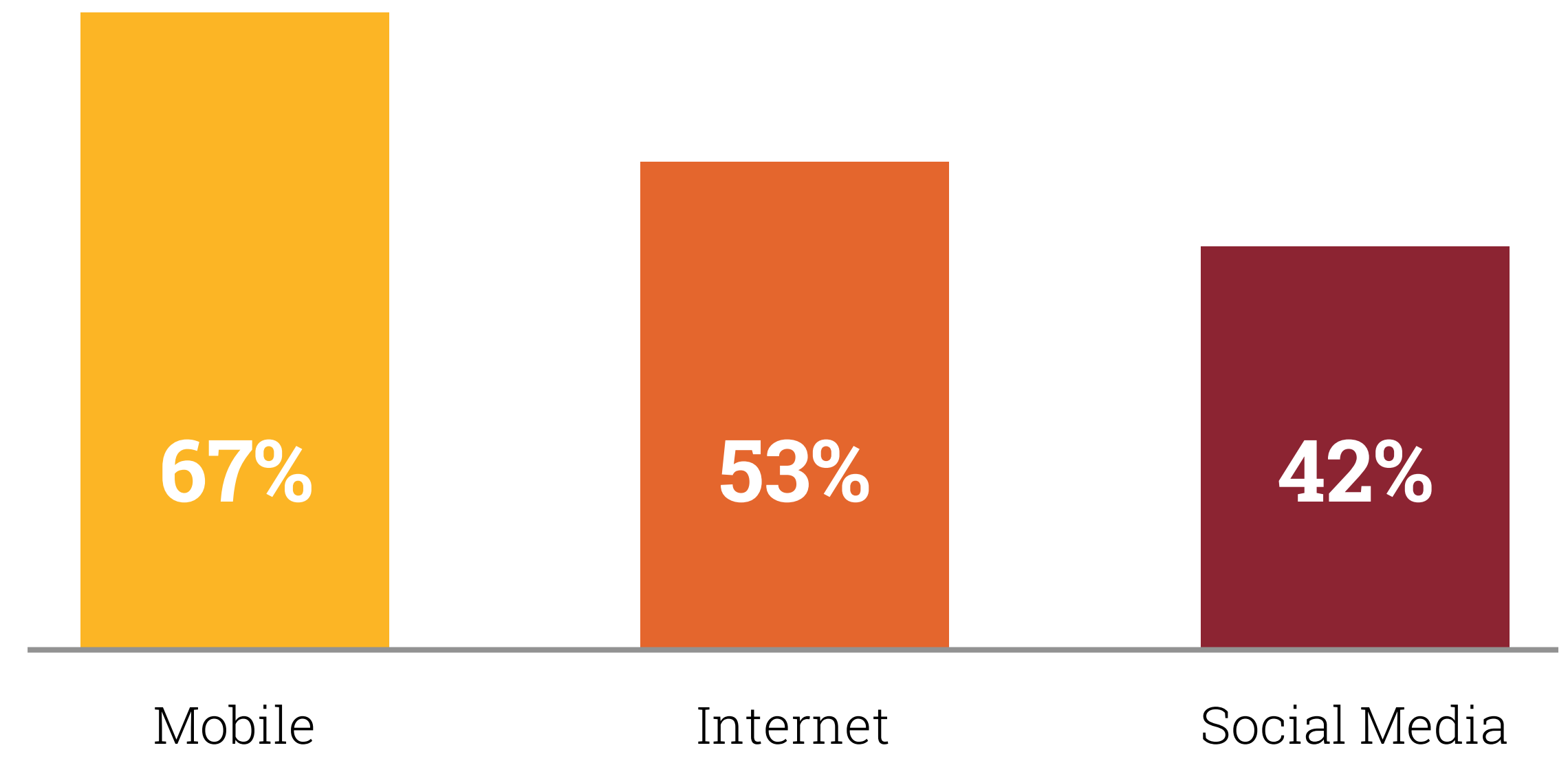


IMPACT OF TECHNOLOGY

The Digital Landscape

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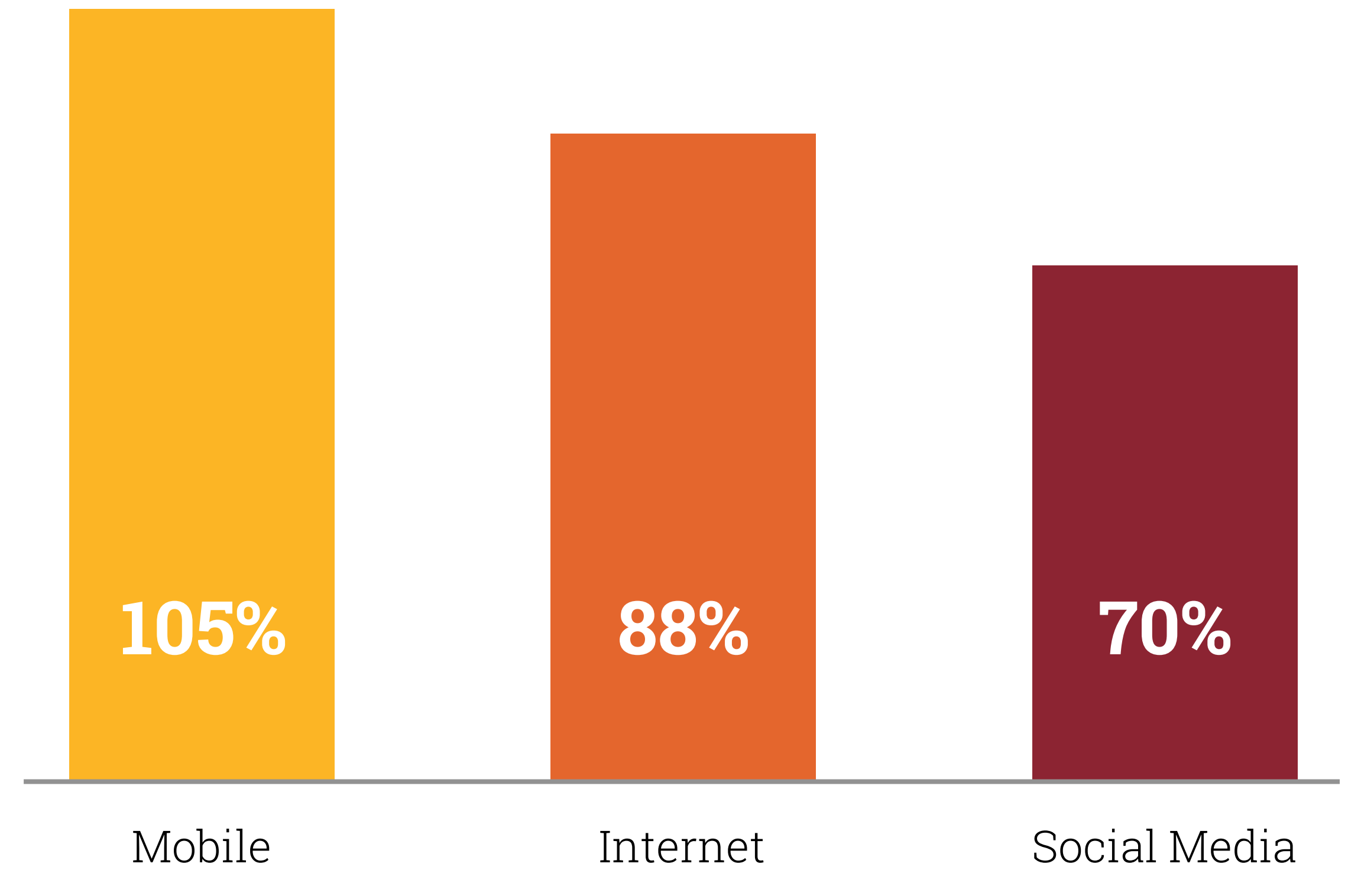
2018 Digital Use Worldwide



Takeaway:
The world is online

Total Population = 7.6 billion
Mobile users = 5.1 billion / **+4%**
Internet users = 4.0 billion / **+7%**
Social Media users = 3.2 billion / **+13%**

2018 Digital Use In The U.S.



Takeaway:

The U.S. is a mobile country

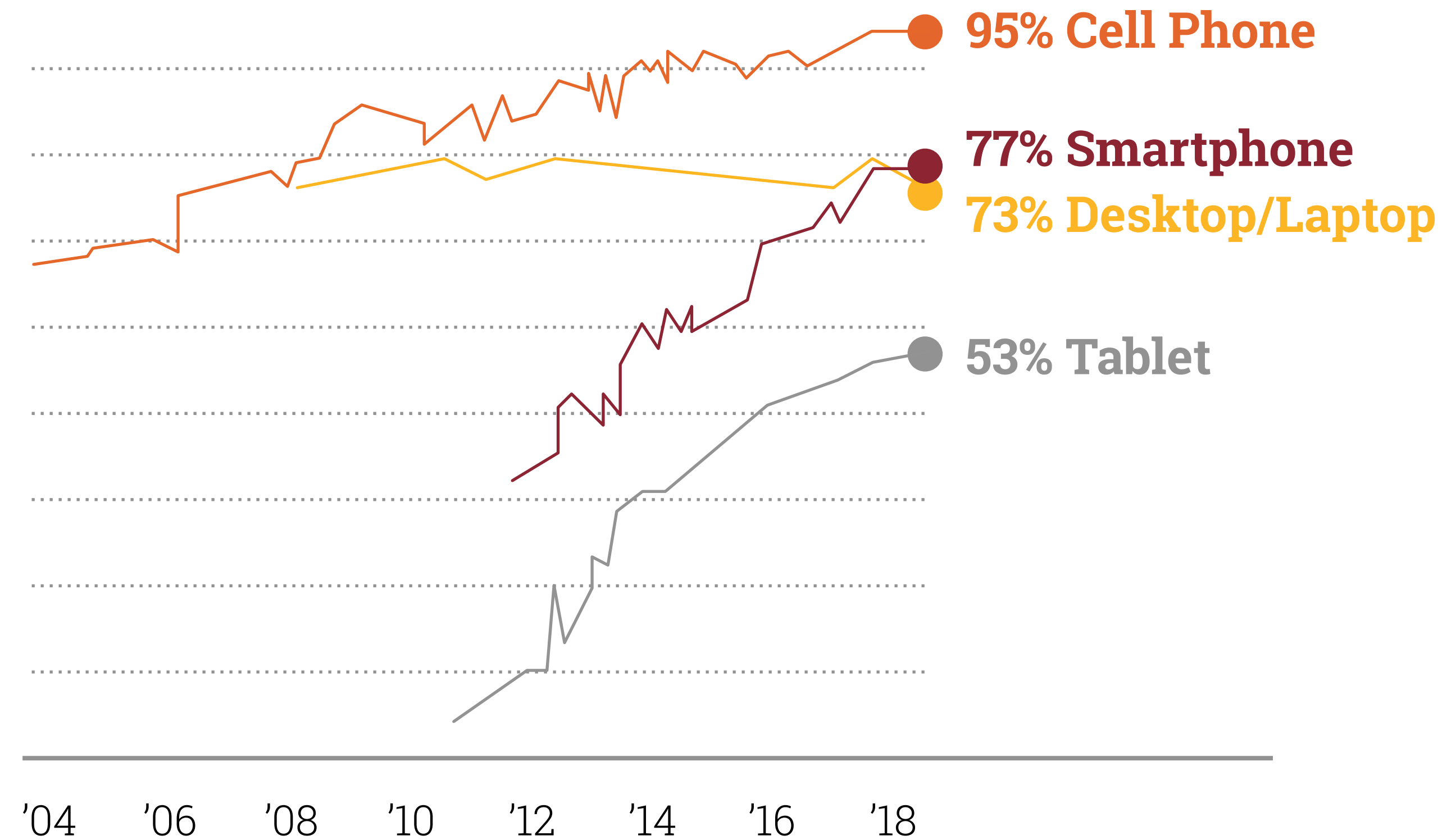
Total US Population = 326 million

Mobile subscriptions = 341 million

Internet users = 287 million

Social Media users = 230 million

Digital Technologies



% of U.S. adults who say they own or use each technology

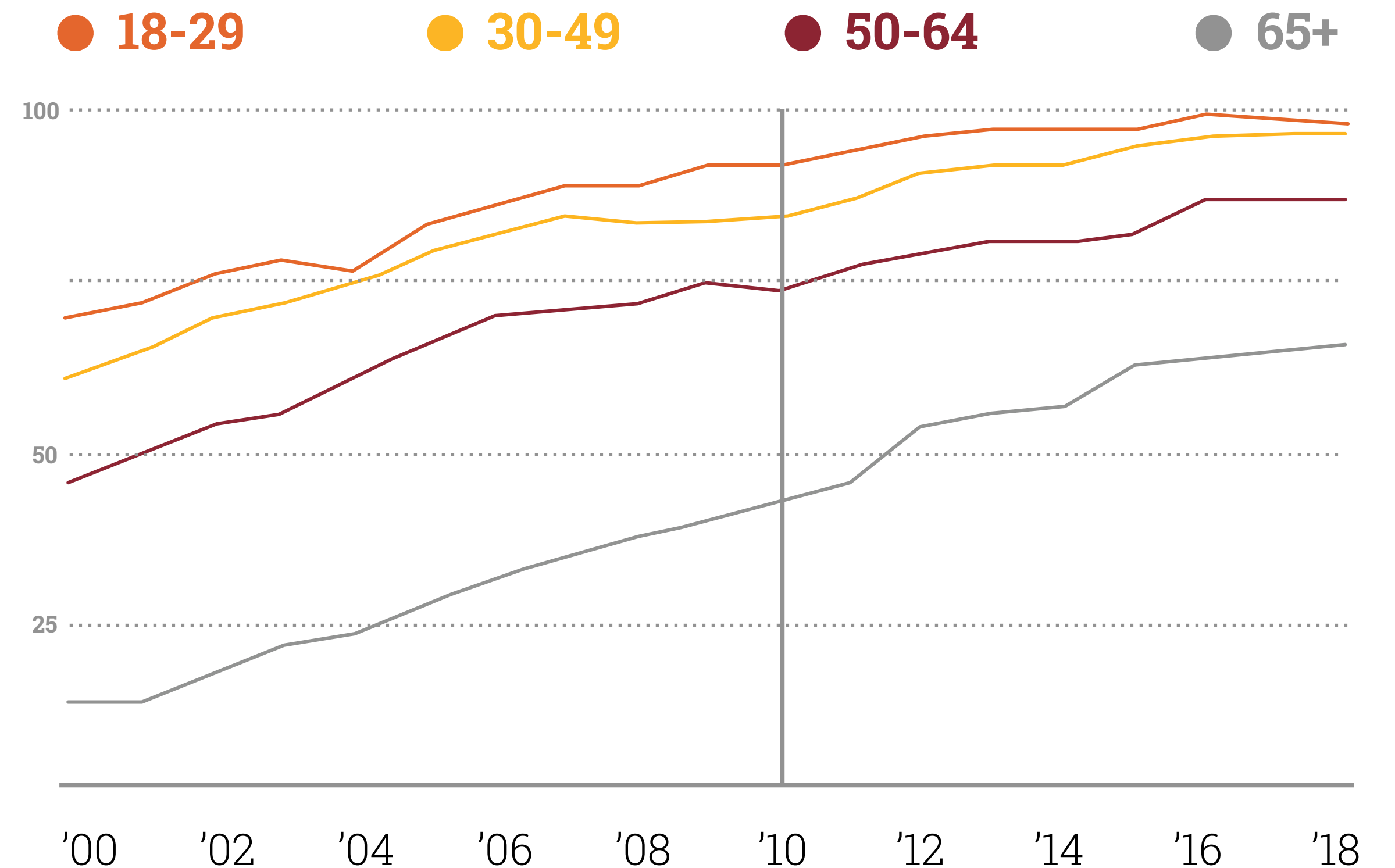
Takeaway:

Look at the split of mobile vs. desktop usage, this is why we build mobile first.

Internet Usage in U.S.

Takeaway:

65+ is later to the game, but joining very fast.



% of U.S. adults who say they own or use each technology

How Often Do You Use the Internet?

Takeaway:

Being online is no longer a planned activity. It is a part of their daily life.

	18-29	30-49	50-64	65+
Almost constantly	40	38	20	11
Several times a day	50	48	49	45
Once a day	4	5	13	17
Several time a week	3	6	8	12
Less often	3	3	10	15

% of U.S. adults who use the internet, by age

Which of the Following Activities Do You Participate in on a Regular Basis? “Surfing the Internet”

.....
General Population / 75%



Millennials

74%



Gen X

80%



Boomers

75%



Matures

67%

“Use the Internet to Research Charities that I am Considering Giving a Gift”

.....
General Population / 42%



Millennials

51%



Gen X

45%



Boomers

35%



Matures

27%



Who “Holds the Keys” Now?

1/3 of Matures and Boomers are using the internet to research charities they are considering giving a gift

More than one-half of frequent donors, and wealthier donors are using the internet to research charities they are considering giving a gift

Society's View on NPO's

- Giving More to Fewer
- “Giving” vs “Investment”
- Trust

Gift Intention: Q: Of those who would split gifts, if you were to sign a will in the next 6 months, how many charitable organizations would you be likely to include?



Millennials

20% One
42% Two
 29% Three
 9% >Three



Gen X

19% One
45% Two
 27% Three
 9% >Three



Boomers

19% One
39% Two
 30% Three
 12% >Three



Matures

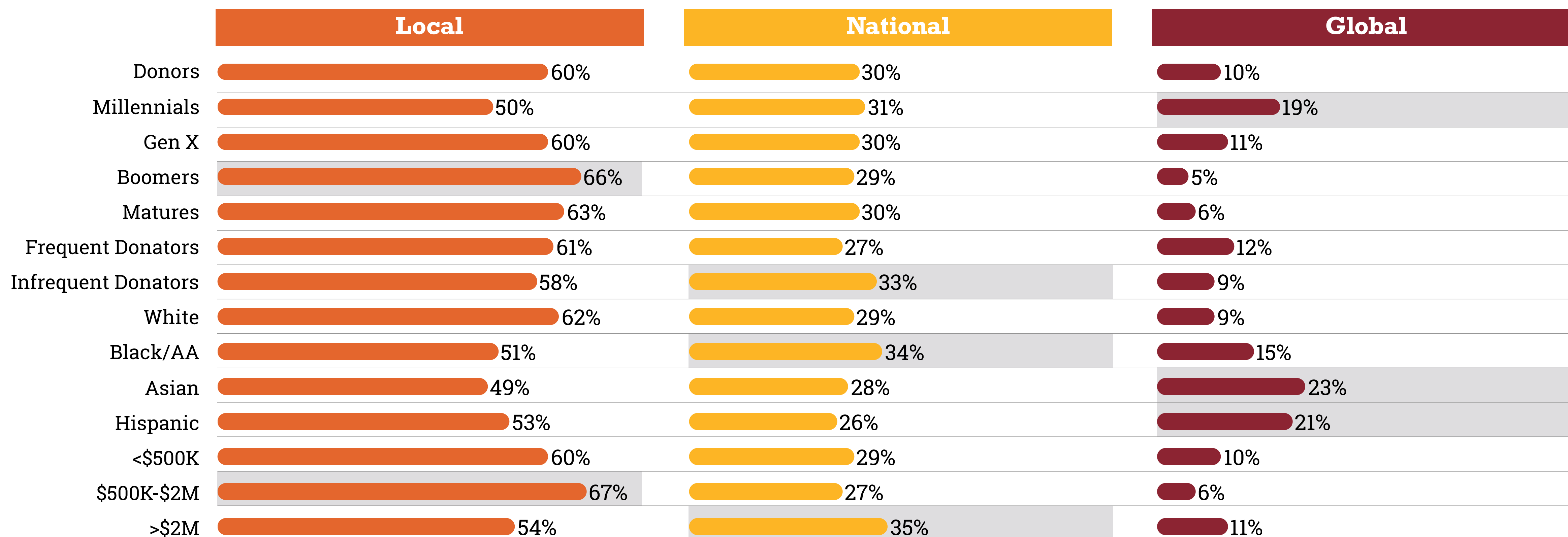
4% One
51% Two
 32% Three
 13% >Three

Views on Impact of Gifts

- Nearly 7 out of 10 donors prefer to give to local organizations over national or global nonprofits
- Want their gift to make a meaningful impact on a personal level

Donors Like to Keep It Close to Home

% donors indicating which type of organization they prefer to donate to



Gray boxes highlight the groups which are high across the types of preferred organizations



Feed the Next Generation in Pike County

Dear Julie,

Thanks to you, the Southeastern Ohio Food Bank served more than 17,000 people in your neighborhood.

Unfortunately, there's much more to be done, and we need your help to ensure we can be there to feed families in Pike County who are struggling.

In this issue of our newsletter, you'll learn about one of the simplest ways to extend your support into the future. A gift in your will or living trust is a flexible ways to help continue the fight to end hunger in Pike County.

Thank you for all you do to support the Southeastern Ohio Food Bank. Together we can improve the lives of Ohioans by ending hunger.

Sincerely,

Mary Anderson

Mary Anderson
Planned Giving Officer

P.S. Return the enclosed survey to learn more about how you can help ensure that children in Pike County don't go to school hungry.



Feed the Next Generation in Ross County

Dear Douglas,

Thanks to you, the Southeastern Ohio Food Bank served more than 20,000 people in your neighborhood.

Unfortunately, there's much more to be done, and we need your help to ensure we can be there to feed families in Ross County who are struggling.

In this issue of our newsletter, you'll learn about one of the simplest ways to extend your support into the future. A gift in your will or living trust is a flexible ways to help continue the fight to end hunger in Ross County.

Thank you for all you do to support the Southeastern Ohio Food Bank. Together we can improve the lives of Ohioans by ending hunger.

Sincerely,

Mary Anderson

Mary Anderson
Planned Giving Officer

P.S. Return the enclosed survey to learn more about how you can help ensure that children in Ross County don't go to school hungry.



Feed the Next Generation in Jackson County

Dear Eric,

Thanks to you, the Southeastern Ohio Food Bank served more than 17,000 people in your neighborhood.

Unfortunately, there's much more to be done, and we need your help to ensure we can be there to feed families in Jackson County who are struggling.

In this issue of our newsletter, you'll learn about one of the simplest ways to extend your support into the future. A gift in your will or living trust is a flexible ways to help continue the fight to end hunger in Jackson County.

Thank you for all you do to support the Southeastern Ohio Food Bank. Together we can improve the lives of Ohioans by ending hunger.

Sincerely,

Mary Anderson

Mary Anderson
Planned Giving Officer

P.S. Return the enclosed survey to learn more about how you can help ensure that children in Jackson County don't go to school hungry.

12404 Jackson, OH 45640

Tel 740-286-6685
Fax 740-286-6686
seohiofoodbank.org



25,000

people in Jackson County
don't have enough
food to eat.



3 million

meals missed by hungry
families in the region.

**10,000 OF THOSE
ARE CHILDREN**

Patience and Trust

Dwindling

- Impact of news reports
- Impact of Charity Navigator & Guidestar

Above the law: America's worst

cha

By Kris Hu



St. Joseph's Indian School
We serve and teach, we receive and learn.

Search

Login

Sign-up

DONATE ▾

[About](#)[Youth Programs](#)[Our Children](#)[Ways to Give](#)[Lakota Culture](#)[Contact](#)

You may have seen or read about St. Joseph's Indian School appearing on the Anderson Cooper 360 broadcast of November 17, 2014. The broadcast showed an accurate summary of how we serve the Lakota (Sioux) children in our care. Unfortunately, the Anderson Cooper 360 show spent the rest of the segment criticizing our work to help Native American youth.

We are always happy to share our work. We are proud to carry on St. Joseph's mission, which is made possible through your generous gifts. As we do with all our visitors, we gave the crew a tour of our campus homes; the Akta Lakota Museum and Cultural Center; and the recreation center. They had a real opportunity to see the children and many of the programs available to them because of your support.

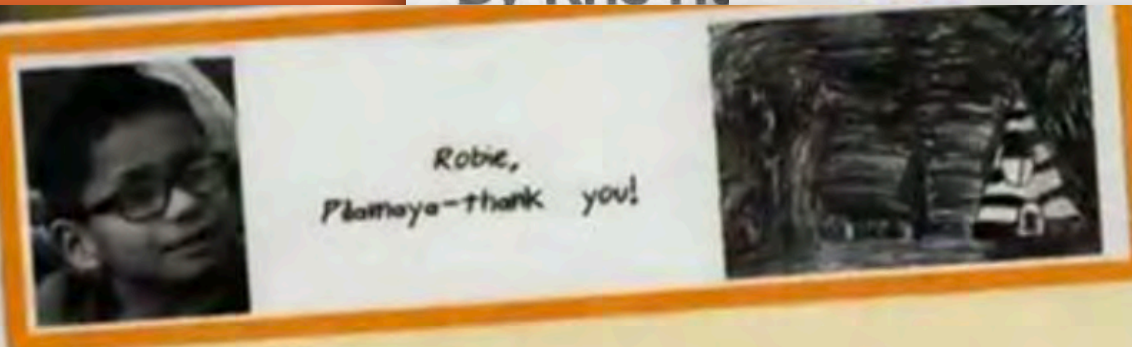
Much to our disappointment, CNN showed little interest in the Lakota students and were generally dismissive of the programs and services we provide to help them.

We want you to know the facts and assure you our mission to serve is unwavering despite this negative story. We want you to know your decision to support St. Joseph's Indian School demonstrates sound judgment regardless of how CNN has tried to portray us.

To set the record straight, we took it upon ourselves to fact check their story. Here is what we found:

- **CNN: "Stories of fake students."**

FALSE: The stories we share in our marketing information are based on real situations. However, in order to protect the privacy of the children, we do not use their real names in our letters. The photos we use are also real students, but not the photo of the child described in the letter. CNN's argument rests on saying the stories are made up. We repeatedly explained this to the executive producer, but he refused to listen.



Dear Robie,

When I wake up in the morning, I thank
God I'm at St. Joseph's Indian School.

Like other kids here, my home on the
reservation isn't a safe place for me to be.
Sometimes my dad drinks and hits me. Not long
ago my mom left me at my Grandma's house
and she said she didn't want me anymore. She
chose drugs over me.

That's why I'm at St. Joseph's. That's why
you help our school. You are keeping
me safe.

KEEPING THEM HONEST

STORIES OF FAKE STUDENTS, NATIVE AMERICAN SCHOOL RAISES MILLIONS

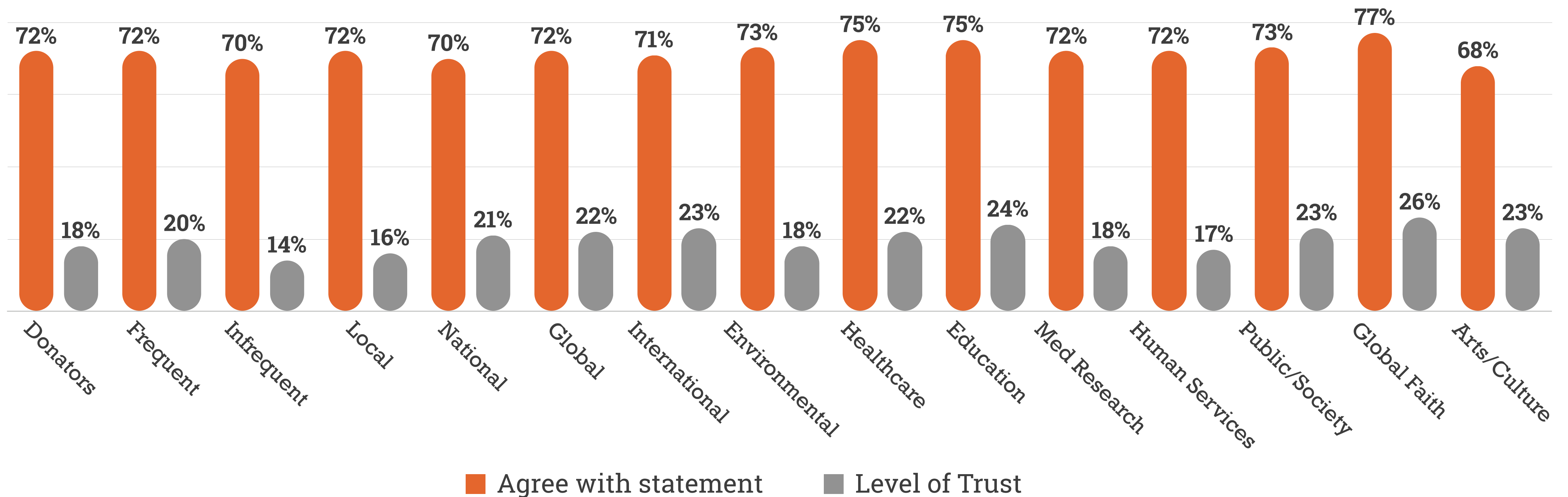


#AC360

mission
threat
cancer
patient
trauma
father
and e
to ma

Majority Indicate They Only Donate to Organizations That Give 100% of Their Donation to The Cause, About 1 in 5 Totally Trust an Organization to Do So

% donors who indicate...



Correcting the overhead myth: How Dan Pallotta's TED Talk has begun to change the conversation

Dan Pallotta:

The way we think about charity is dead wrong

TED2013 · 18:54 · Filmed Mar 2013

27 subtitle languages

View interactive transcript

Share this idea

Facebook LinkedIn Twitter Link Email Embed

4,185,676 Total views

I'M OVERHEAD.

"I manage fundraising for the Breast Cancer Alliance. My job is to get more people to give so that our researchers can do more to find a cure. My salary gets labeled as "overhead," as if the work I do doesn't go to the cause. But without the work I do and the money I raise, there is no cause. My sister died of breast cancer. That's why I do this work. I'm committed to the cause every bit as much as the doctors who do the research. I work on "the cause" every hour of the day, every day of the week. Overhead gets a bad rap. My name is Martin Hodges. I'm committed to ending breast cancer, and I'm overhead."

Martin Hodges
Breast Cancer Alliance

CharityDefenseCouncil.org

CHARITY
DEFENSE
COUNCIL



100% of your money brings clean water to people in need.

Join our monthly giving community and transform lives for families around the world. Every single penny will help bring clean water to communities in need.

GIVE MONTHLY





PROVIDING HOPE

Because of the thoughtful generosity of people like you, BrightFocus Foundation has been able to fund scientists to investigate causes, treatments and possible cures of diseases through our three programs—**Alzheimer's Disease Research, Macular Degeneration Research and National Glaucoma Research**. These programs have provided funding for:



MORE THAN
\$87 million
in Alzheimer's disease
research projects.



MORE THAN
\$15 million
to scientists studying
macular degeneration.



MORE THAN
\$24 million
to scientists studying
glaucoma.



**Generation
Shift**



**Advances in
Technology**



**Fair or Unfair
Views on Charity**

2

Understanding Today's Donor



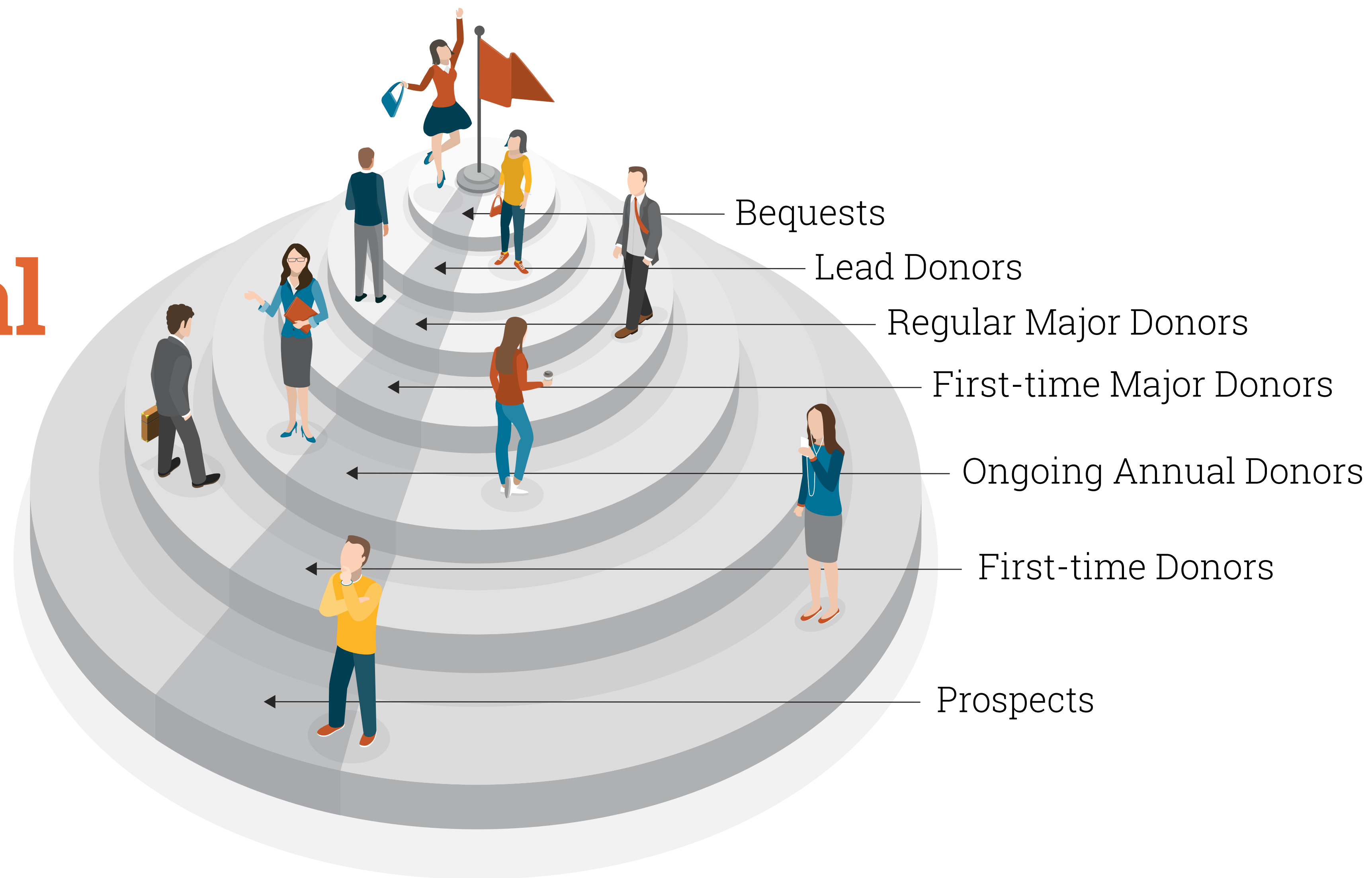
THE
66% vs. 34%

.....

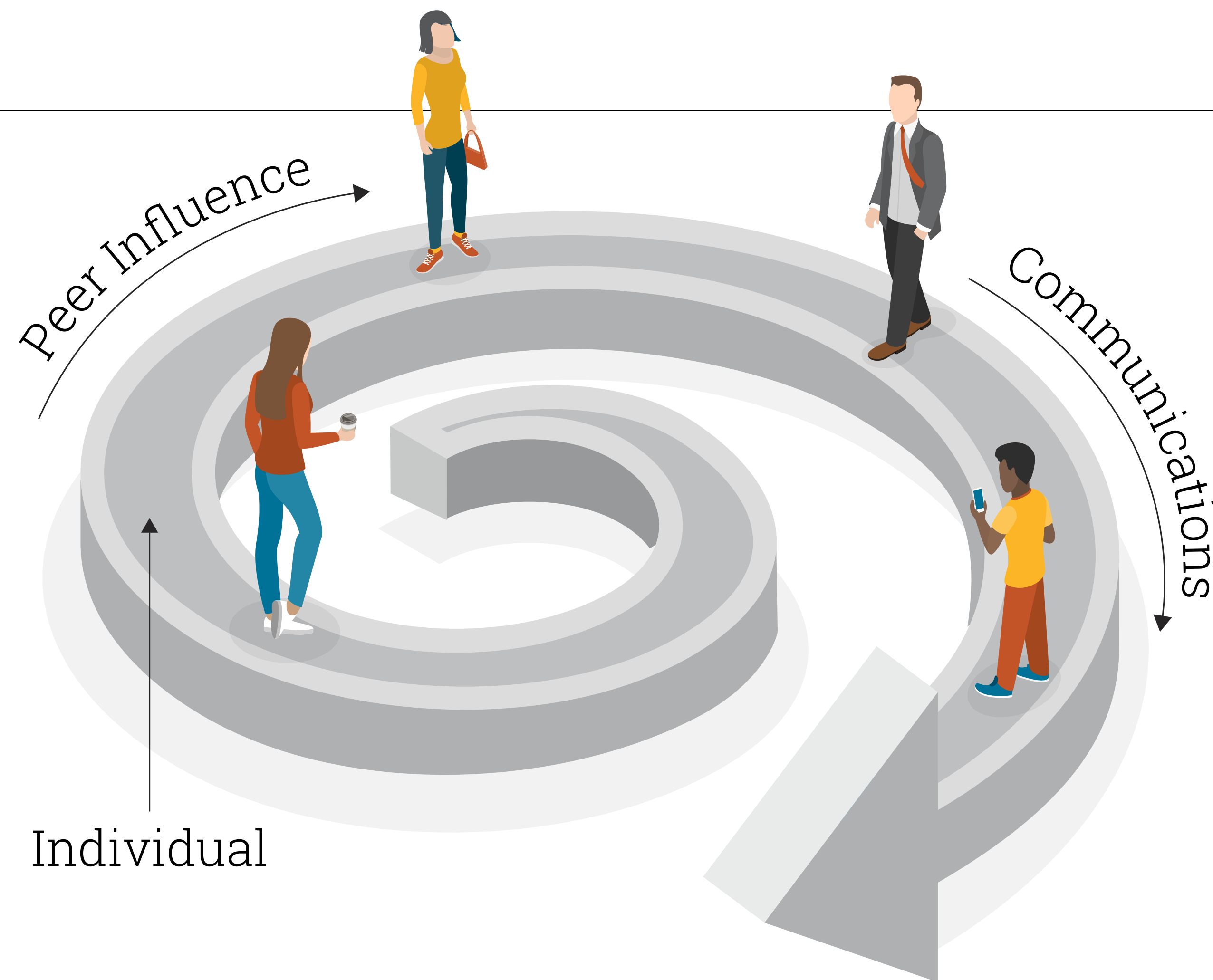
Annual Giving Unfairly Sets Expectations

ANNUAL GIVING	ISSUE	PLANNED GIVING
Many	Number of Viable Prospects	Few
High	Known Activity	Very Low
Low	Donor Cost of Entry	High
Few	Number of Stakeholders	Many
Individual Donor	Decision Maker(s)	Multiple Individuals
Self-Service	Completing the Gift	Requires Professional Assistance
Cost Per Lead	ROI Measurement	Cost Per Lead

The Typical Donor Pyramid

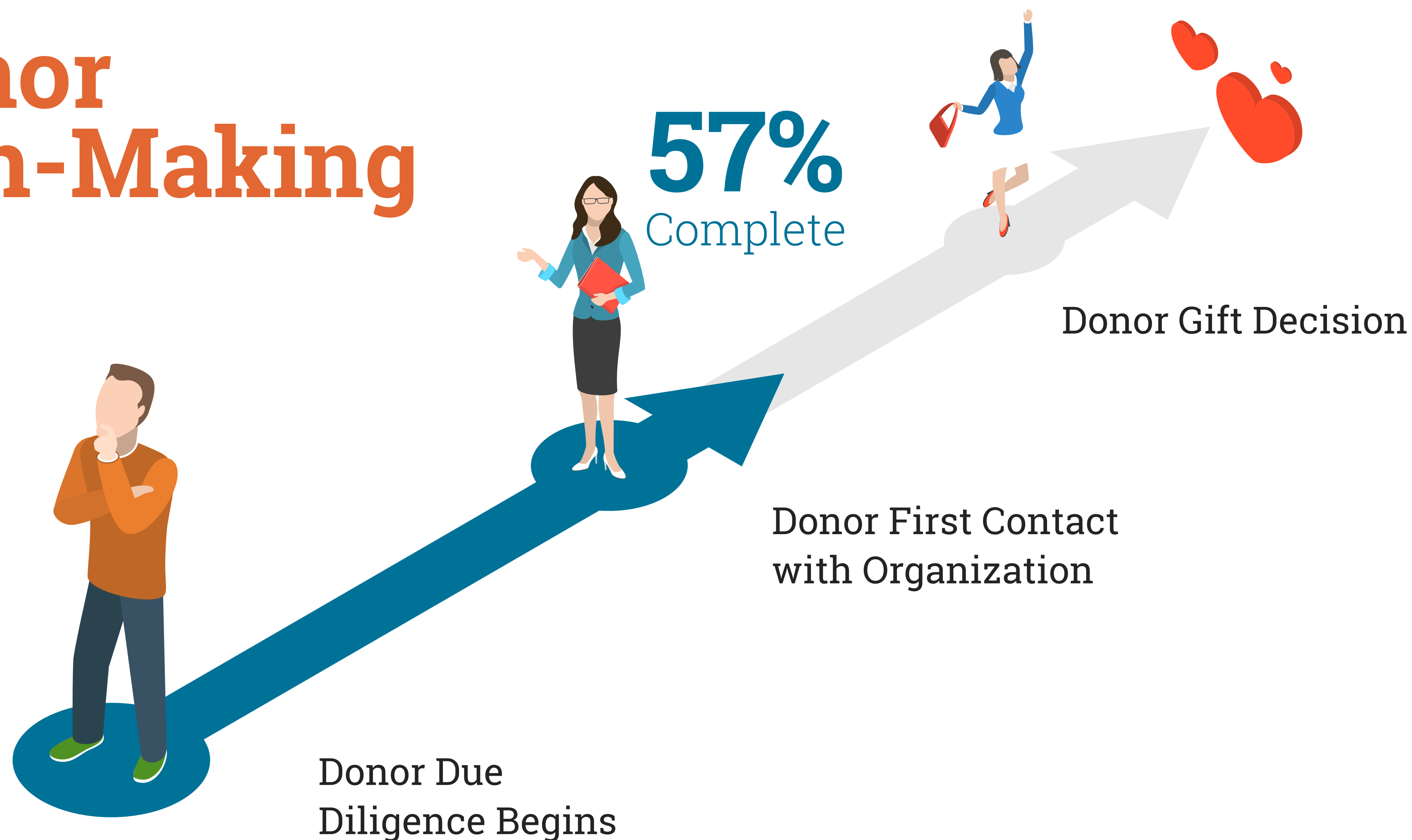


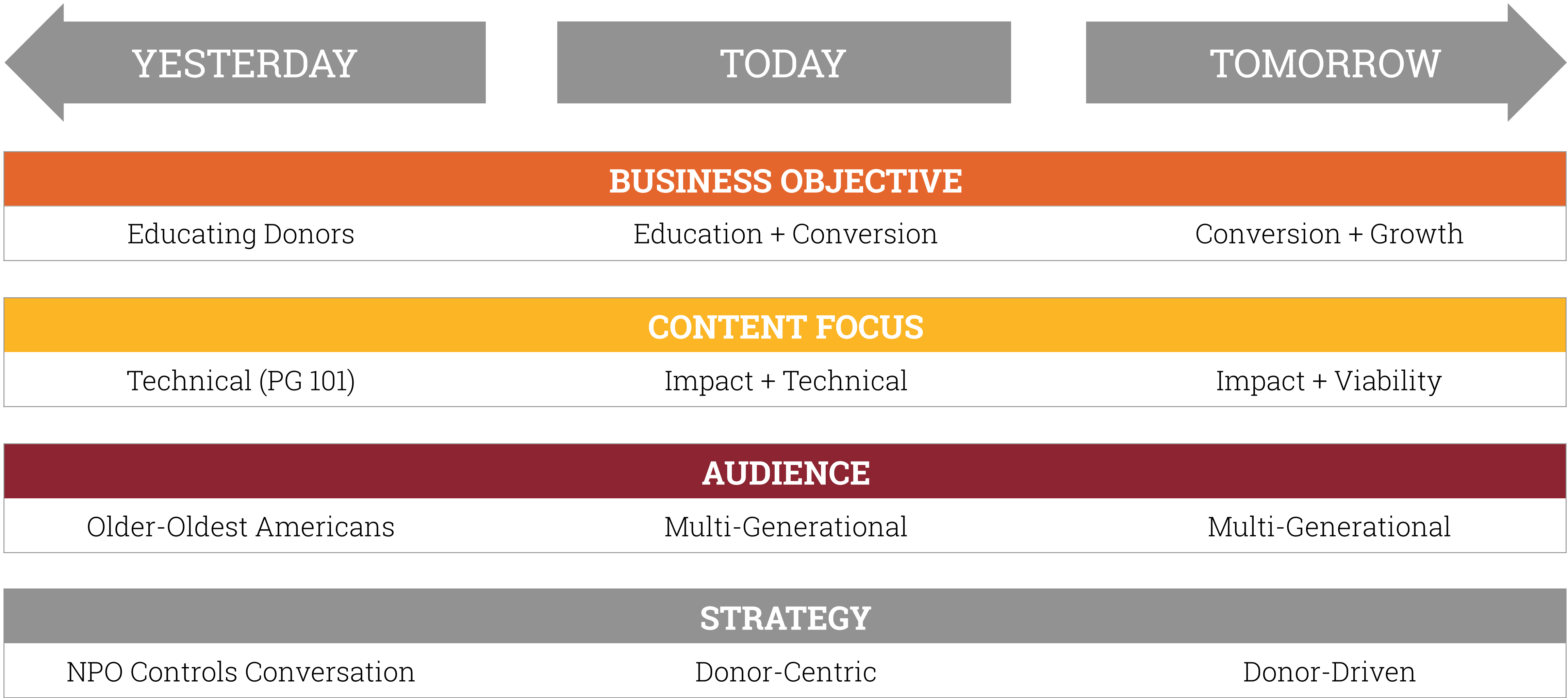
The Donor Vortex



← Measurement of Engagement & Ability to Influence Others →

The Donor Decision-Making Process





A CHARITABLE PLANNING GUIDE FOR ISU ALUMNI AND FRIENDS | FALL 2017



Thanks to scholarship support, Marissa Carlson is pursuing her passion for bringing enjoyment to others.

Insights

A Silent Force

With passions for business and working with people, junior Marissa Carlson deemed hospitality management the perfect major to study at Iowa State. "I love being behind the scenes of people's vacations so that they can enjoy every second of their getaway without worry," she said. "I take pleasure in being the silent force that allows guests to relax and have fun."

At Iowa State, Carlson is involved with numerous student groups, including serving as the fiscal director for Human Sciences Week and treasurer for Starts with Soap, an organization that seeks to provide basic necessities to the nation's most underfunded schools. This past summer, Carlson also worked as a marketing intern with Pinstripes, a restaurant and event venue that combines food with bowling and bocce ball.

Carlson plans to use her skills in hospitality management to work for a cruise line, country club or resort after graduation. "It's my dream to be in charge, helping to

make a business run smoothly and positive for the employee, coworker or guest I work with." Scholarships like the Anne Shaner Hotel and Institution Management Award allow students to fully immerse herself in hands-on experience at Iowa State. "The field I have chosen to study is not just about money, but it's about passion. I know I will make lots of money but it's not my passion. Scholarships enable me to pursue my studies without worrying about my financial situation. I'm thankful to donors for making attainable education possible!"

Inside This Issue

From chairperson of the annual cherry pie sale to the '50s to creating scholarships for generations of Iowa State students, Marissa has always given back to Iowa State in meaningful ways.



Anne Shaner treasures the memories and friendships she made at Iowa State.

Passing It Forward

One of Anne Shaner's most

memorable experiences at Iowa State University was serving as chairperson of the annual cherry pie sale. It was a full operation to manage students baking thousands of small pies made from scratch. "You had cherries – that came in 5-gallon cans – that you had to cook and thicken for the filling and then place in tart shells made in Friley Hall," explained Shaner, a 1957 graduate.

The cherry pie sale began in 1920 to raise money for the home economics club. That first year, students sold 2,000 pies, which required 80 pounds of flour, 50 pounds of shortening, 30 gallons of cherries, 60 pounds of sugar, 15 pounds of cornstarch and 166 bricks of ice cream. In the '50s, Shaner's team sold 7,000 pies.

Overseeing the student-run sale was good practice for her upcoming career.

After receiving her bachelor's degree in institution management – a precursor to the hospitality management program – the Iowa native headed to Rochester, New York, for a year-long internship at the Eastman Kodak plant, where she helped serve 35,000 meals a day to the employees of the film and camera company.

It was former Iowa State University instructor Carolyn Cason who helped Shaner land her first job assisting in food service management at Rice University. "My large quantity cookery teacher had gone to Rice University at the end of my junior year," Shaner explained. "She called me and asked if I would like to work for her."



Dear Friend of Iowa State,

Your clients are making a meaningful difference at Iowa State and in their own communities. Thanks to your guidance, their thoughtful planning for the future will no doubt be felt for generations to come.

As we surpass the one-year mark since we launched *Forever True, For Iowa State* – our most ambitious and transformative campaign ever – I am grateful for the overwhelming support shown by our alumni and friends. Together, these donors are investing in the exceptional minds, cutting-edge research and promising students for which Iowa State University is known. And they're making it possible to extend the university's land-grant mission and exceptional student experience well into the future.

In this issue of *Insights*, we connect the dots between donor and student. We learn why Anne Shaner established the Anne Shaner Hotel, Restaurant and Institution Management Award and how one student, Marissa Carlson, is making the most of this scholarship.

If you have clients who value the promise Iowa State students bring to the future of our state and our world, we hope you'll suggest that they consider the Iowa State University Foundation in their charitable intentions.

Our office of gift planning is happy to answer any questions you may have about the impact of philanthropy at Iowa State and gift options that will help your clients fulfill their charitable goals.

Best Regards,

Rob Kinsey

Rob Kinsey
Executive Director of Development
800.621.8515

P.S. Our website, isugift.org, provides complimentary brochures and tools designed to help you and your clients.



Iowa State

gave me a good education, and now

I can help give to someone else.

– ANNE SHANER



Shaner met her husband, Gary, at Rice, where he was working on his chemical engineering degree and serving as a member of the Navy ROTC. After the couple married, they lived in Guam for three years, started a family and eventually moved back to Iowa, where Anne became a consulting dietitian for assisted living and skilled-care facilities.

Throughout the years, she has treasured the memories and friendships she made at Iowa State. "College is the time in your life when those experiences are important," Shaner said, whether they are cultivated in the classroom or while making thousands of cherry pies.

She wants to help nurture meaningful experiences for current and future Iowa State students – a goal she is accomplishing through two types of scholarships.

The Anne Shaner Hotel, Restaurant and Institution Management Award provides scholarships to current students accepted into Iowa State's hospitality management program. She has also established a gift through her will to endow the Anne Shaner Internship Scholarship for students participating in an unpaid internship or student teaching.

For Shaner, giving back to her alma mater is like passing food around the dinner table – there is a time when you receive and a time when you pass it forward. "Iowa State gave me a good education, and now I can help give to someone else."



You can join Anne Shaner in making a meaningful difference in the lives of Iowa State students. Contact the office of gift planning at 800.621.8515 or visit isugift.org to discover smart ways you can make a planned gift – and a lasting impact on Iowa State University.

IOWA STATE UNIVERSITY FOUNDATION

Create Your Legacy at Iowa State

Simply check the boxes that describe you and return this survey in the enclosed envelope today.

☐ I would like the complimentary guide *Give From the Heart With a Tribute Gift* so that I can learn more about making a gift that honors a loved one.

☐ I want to make a gift to Iowa State because it has been important in my life. Please contact me to discuss my options.

☐ I have already included a gift to the Iowa State University Foundation in my estate plan but haven't yet notified you. My gift is in honor of:

Name Relationship

Name – Please print.

Address

City, State ZIP

Telephone



Give From the Heart
With a Tribute Gift



The Sweet Taste of Charitable Giving

When you give to the Iowa State University Foundation this year, Iowa State and its students benefit from your generosity. And the cherry on top? You benefit, too.

Benefits for Iowa State

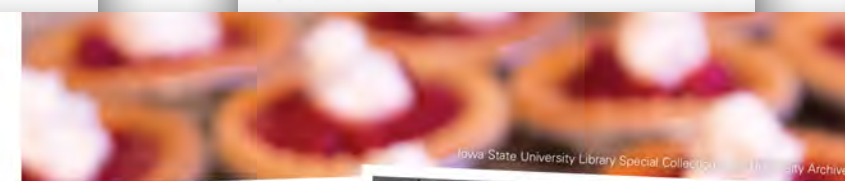
Few pleasures in life offer more personal satisfaction or endure longer than helping others live better lives. By making a gift to the Iowa State University Foundation, you'll help improve lives across campus and around the globe. Your gift will strengthen Iowa State's land-grant mission and enhance the Iowa State experience for this and future generations of students.

Benefits for You

Depending on the gift arrangements you choose, you may reap one or more of the following benefits:

- Reduce your income taxes
- Increase your spendable income
- Reduce or eliminate capital gains tax
- Attain no-cost, worry-free asset management

To discover smart giving options that benefit you and Iowa State University, contact the office of gift planning today to start a conversation.



FUN FACTS Cherry Pie Sale

- In 1920, food preparation instructor N. Beth Bailey suggested baking and selling small pies to raise money for the home economics club.
- Students chose cherry as the pie filling in honor of George Washington, who was known for cutting down a cherry tree and whose birthday was in February, the month the first sale was to take place.

- First made as a 9-inch pie, the desserts were switched to a tart form in the 1940s.
- The pies were topped with ice cream until World War II, when food rationing demanded the use of whipped cream instead.
- The approximate amount of cherries that are used in the cherry pies every year is about 30 5-gallon buckets. The result is about 150 gallons of cherry filling.



From right: Peggy Light, with fellow League Councilor Christa Lyons and Martha Helms



OUR CENTENNIAL VISION

Save the Redwoods League envisions vibrant redwood forests of the scale and grandeur that once graced the California coast and the Sierra Nevada, protected forever, restored to grow old again, and connected to people through a network of magnificent parks and protected areas that inspire all of us with the beauty and power of nature.

BE ONE OF THE 100

Join Mike Helms, Peggy Light, and other dedicated legacy donors at the dawn of the League's second century. The favor of your reply is requested by **July 16**.

- ☐ **I am interested in joining other supporters of the redwood forests by becoming a member of the Redwood Legacy Circle.** Please contact me with more details about how I can support the forests' future with a planned gift, and generate \$1,000 today.
- ☐ **I accept with pleasure.** I have already included Save the Redwoods League in my estate plan, but have not previously informed you. Please contact me so that I can officially be counted among the 100, and generate \$1,000 for the League today!

Name (Please print.)

Address

City, State ZIP

Telephone Email

We respect your privacy. Information collected here will not be shared outside of our organization.

that fits my family legacy."

— Peggy Light



**Pyramid vs.
Vortex**



**Change in
Decision Making**



**Now and
Tomorrow**

3

What Does This Mean For You?



UNDERSTANDING THE

Tactics and Tools

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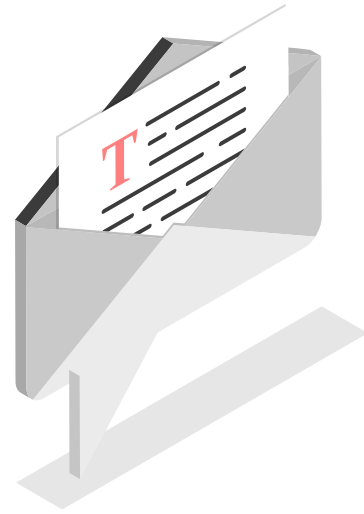
Marketing Drivers



Direct
Mail



Targeted
Mail



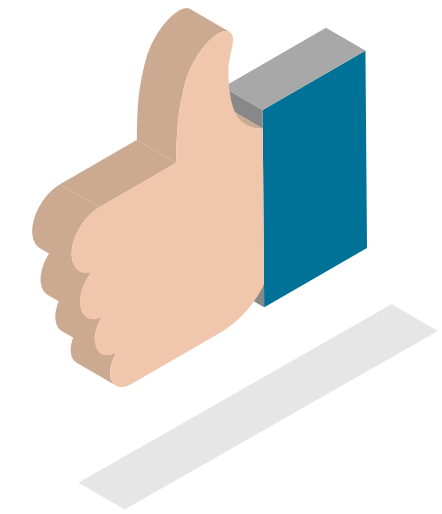
Educational
Email



Targeted
Email



Mail & Email
Survey

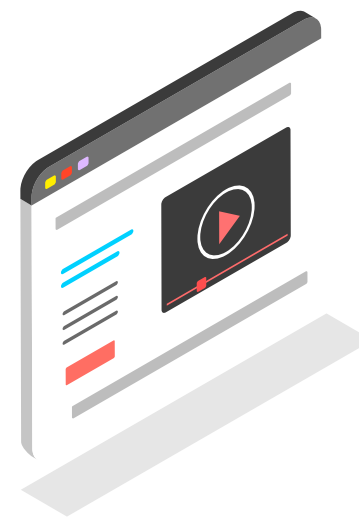


Social

Marketing Destinations



Collateral



Landing Page



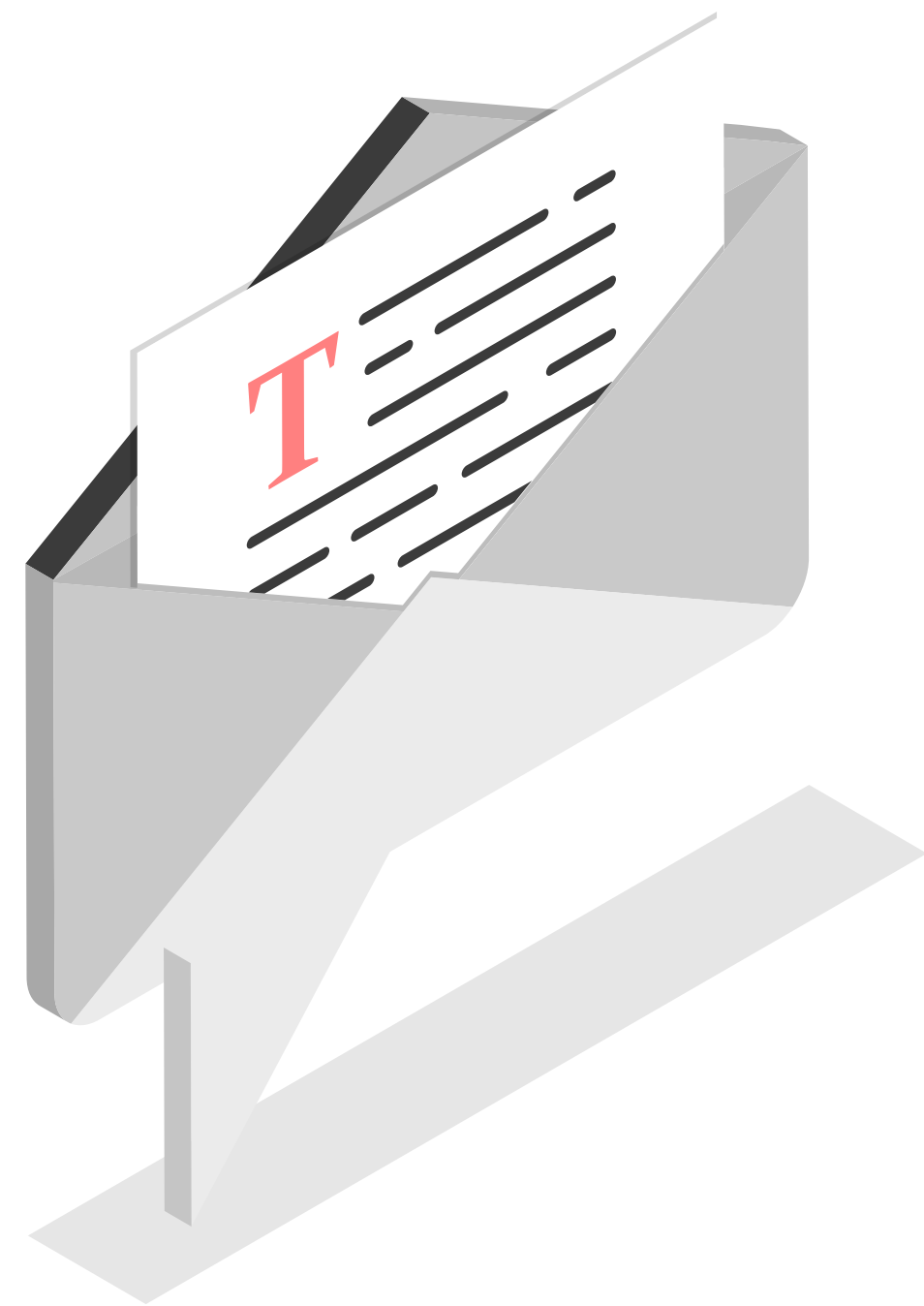
P/G Website



Targeted Email

A Coupon to Your Favorite Restaurant

The marketer knows a little about your interests and is enticing you to connect




Educational Email

Magazine Cover

To sell what's inside and to inspire further reading

Targeted Email

Become a Legend at LSU



TAF
LSU TIGER ATHLETIC FOUNDATION

When you make a legacy gift to the Tiger Athletic Foundation, you ensure that future generations of LSU student-athletes have the same experiences as the legends who came before them. When you make a gift TODAY, your name will live among those of legends on a new TAF Legends Society plaque inside Tiger Stadium.

[TAF Legends Society >](#)

If you have already made a gift to the Tiger Athletic Foundation, or you need additional information about how your gift will benefit future student-athletes, let me know. I would be happy to help.

Contact me
Bunnie Cannon
225.578.0302
BunnieC@lsutaf.org


Tiger Athletic Foundation
P.O. Box 711 | Baton Rouge, LA 70821

The Tiger Athletic Foundation respects your online time and privacy.
If you no longer wish to receive this planned giving eNewsletter, please click [unsubscribe](#).

[VIEW ONLINE](#)

Educational Email

MS National Multiple Sclerosis Society



CREATE A LEGACY

Lisa
DIAGNOSED IN 2007


Dear Shayna,

People affected by MS are relying on us to do whatever it takes to accelerate breakthroughs—life-changing breakthroughs that enable people to live their best lives today, and research breakthroughs that will ultimately end MS forever.

Because of your support in 2016, we invested over \$54 million in more than 380 new and ongoing research studies around the world. We couldn't have done any of it without you. **Together we are stronger.**

I'm confident that together we can change the world for each and every person living with MS. In the articles below, we'll show you how you can make a gift that helps us move toward a world without it.

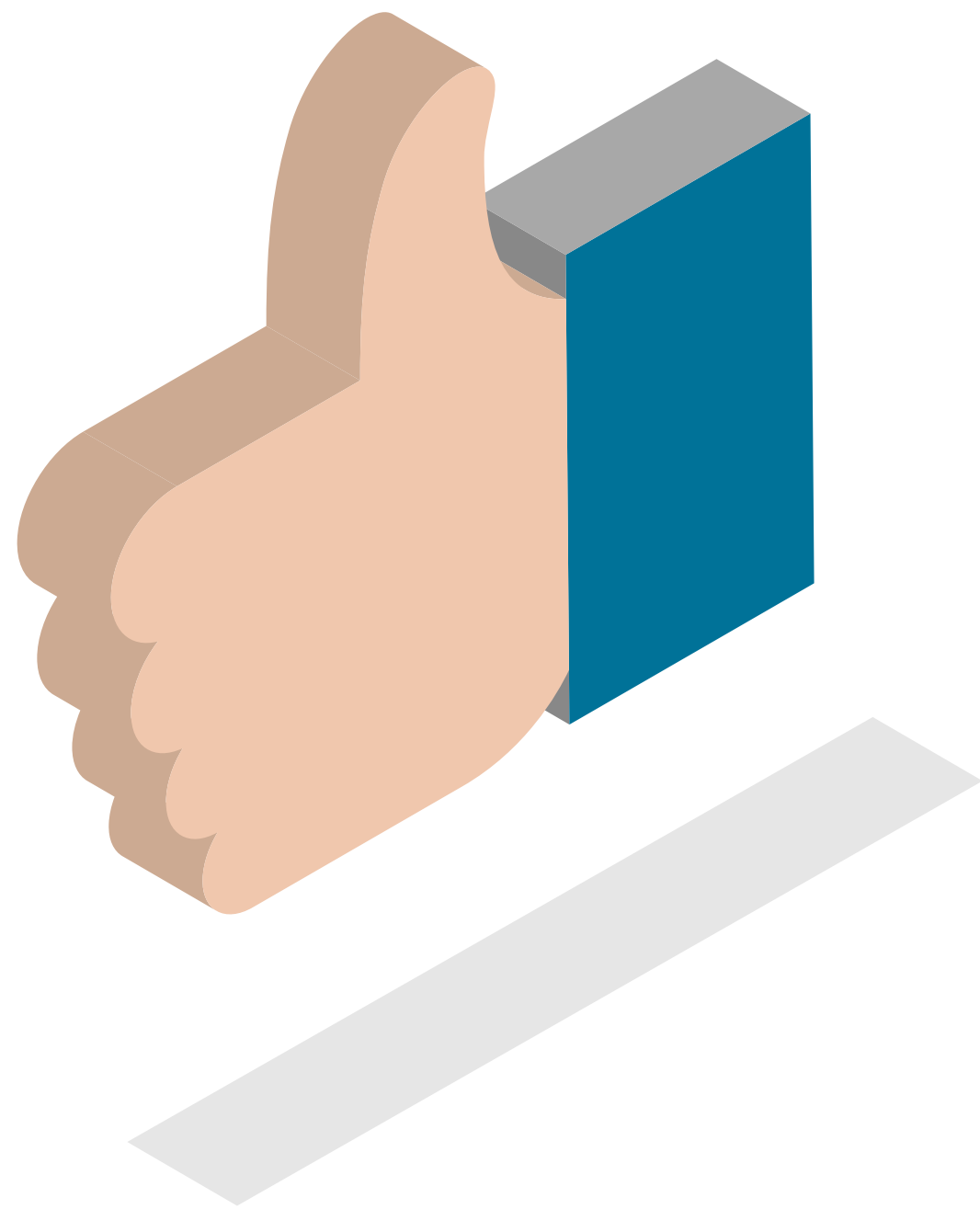
Taylor Mallia
Vice President, Individual Giving



Foundation Gift to Expand National MS Society's Wellness Plan

Eric Hovde believes diet and exercise are the key to living with MS. His gift to the National MS Society will help spread this message of wellness to others with the disease.

[Read more](#)



Social Media

Billboard

For instant brand recognition and a quick connection



Veterans of Foreign

Just now ·

Estate planning is for every



1 Simple Thing YOU

Estate planning allows you to
no matter what twists and turn

HEROES.VFW.ORG/ESTATEPL

Like · Comment · Share

V
VETERA

Class Is



* Name:

* Email:

Address 1:

Address 2:

* City/State

Downlo



NO ONE DOES MORE FOR VETERANS.

HOME JOIN ASSISTANCE VFW IN D.C. NEWS & EVENTS CONTRIBUTE COMMUNITY

FREE Planning Resources

View and download the FREE brochures below to learn more.



VFW PERSONAL ESTATE PLANNING COURSE LESSON BOOK

You may feel like estate planning is about as enjoyable as a bad pop quiz, but we are here to help. Use this lesson book to put together a plan that will benefit you – and generations to come.

Download Now »

MORE BROCHURE DOWNLOADS



A Guide to Making Your Will

Putting together a will is one of the most important ways you can protect your loved ones. And it is not as complicated as you might think. Learn more about wills by requesting our FREE brochure *A Guide to Making Your Will*.

Download Now »



What to Do in the First 48 Hours When You Lose a Loved One

When a loved one dies, will you know what to do? Learn what to do in those first critical days after your loved one is gone in our FREE guide *What to Do in the First 48 Hours When You Lose a Loved One*.

Download Now »



Estate Planning Starters

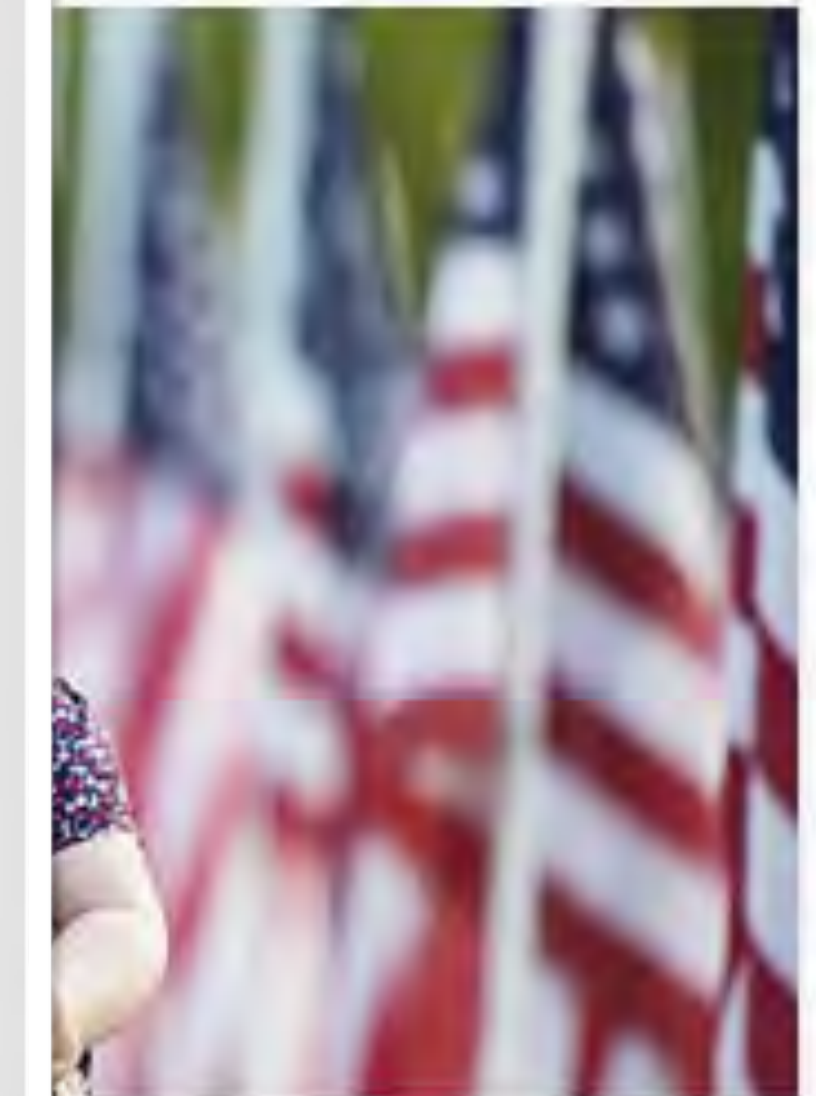
Discover how to ensure a solid financial future for your loved ones and the charitable organizations you love with our FREE guide *Estate Planning Starters*. You will find valuable tips and information on the benefits of careful estate planning.

Download Now »

S | FAQ

UNITY

ge or assets.



OW

causes you care about most,
more today.

Boost Post



FAQ

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Planned Giving Website

Library of Information

A choose-your-own adventure journey
where the donor selects how they browse,
an infinite resource



Gift in Your Will or Living Trust

You want to leave money to The University of Texas at Austin in your will. You *also* want the flexibility to change your will in the event that life circumstances change. You can do both.

In as little as **one sentence**, you can complete your gift. This type of donation to the University in your will or living trust helps ensure that we continue our mission for years to come.

Start Today

Download your **FREE** copy of *A Guide to Making Your Will*.

Get My Guide >

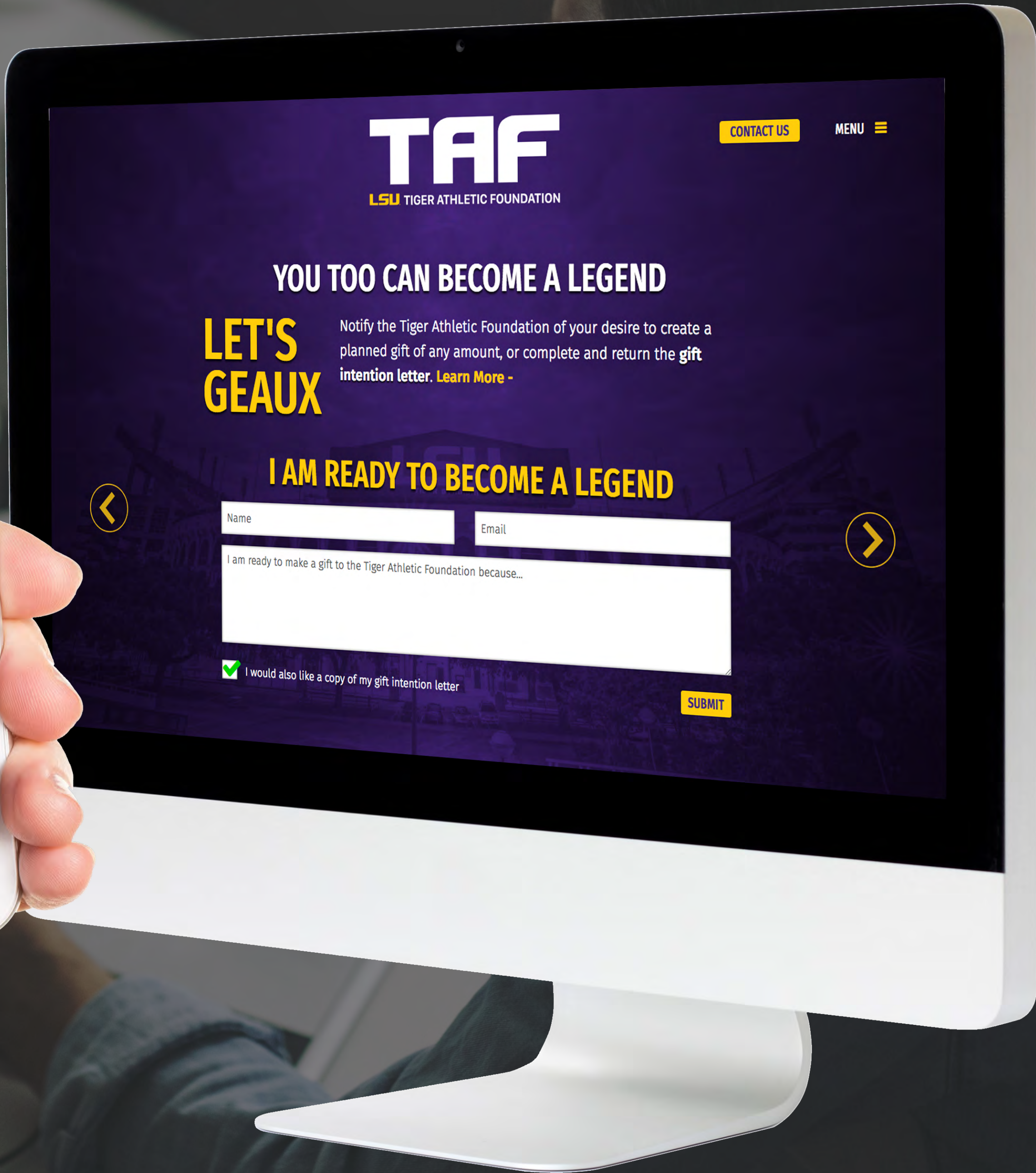
An Example of How It Works

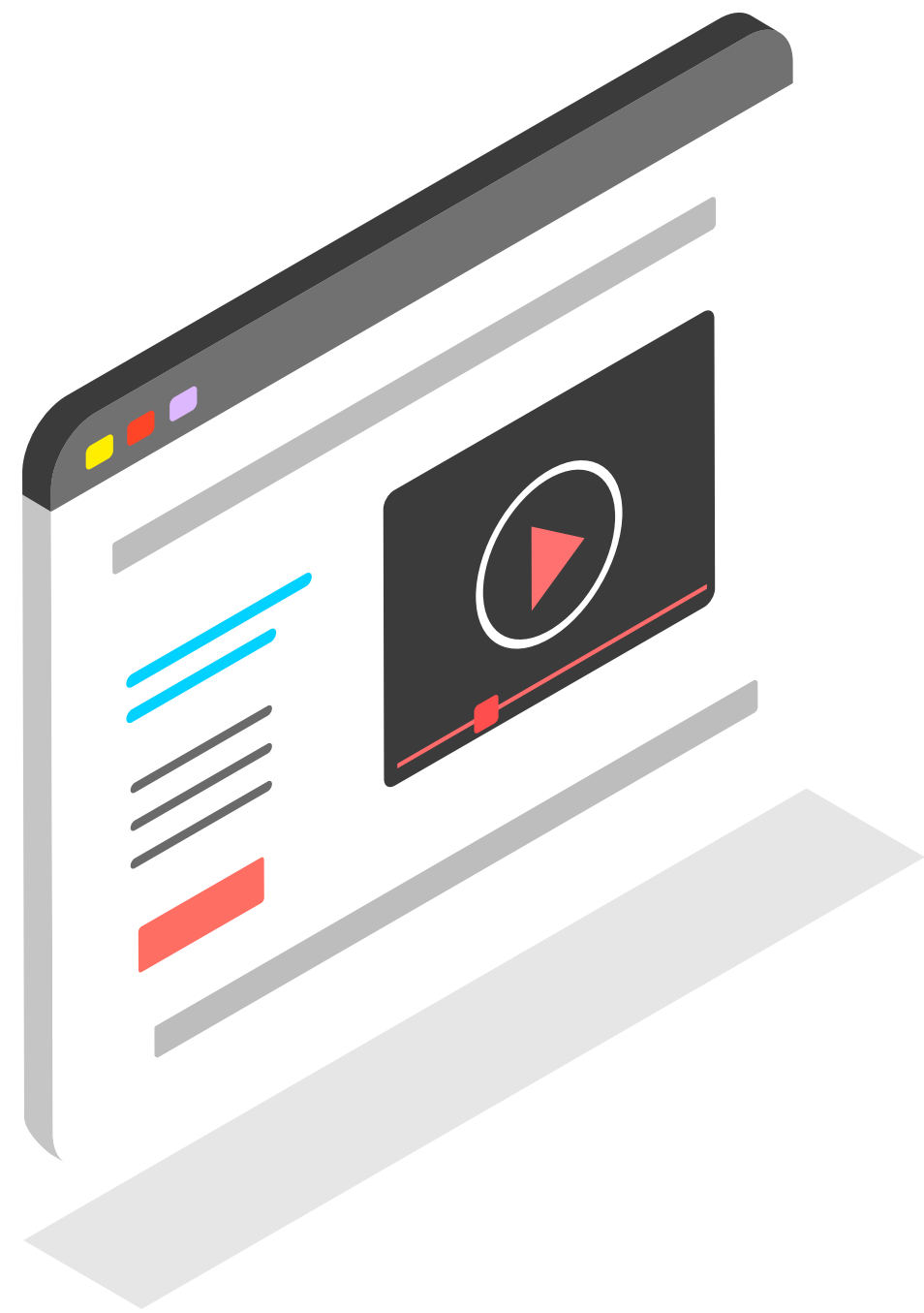


Meet Tom and Martha. When they got married and created a will, they included a \$75,000 gift to the University. As the family grew to include three children, Tom and Martha decided to revise their gift to ensure their children's future financial security.

They met with their attorney and revised the gift language so that the University received a percentage of their estate, instead of a specific amount. Tom and Martha now rest easy knowing their plans will provide for the people they love, as well as the future strength of a Longhorn education.

Watch How It Works >





Landing Page


Your Friend's Facebook Page


Took an action to get from your wall to their page—you wanted to see all the family pictures

Landing Page

[Unsubscribe](#)

Gifts of Real Estate





National Jewish Health®

Breathing Science is Life.®

Dear **Name**,

Does your real estate not quite fit your lifestyle anymore? Rather than selling your property, consider using it to make a difference in the lives of individuals and families with respiratory, cardiac, immune and related diseases.


Donating your home or property to National Jewish Health not only benefits the future of our patients, but yours as well. This gift can provide you a lifetime of income and many tax benefits; such as tax relief from income and capital gains tax. It's a unique way of giving that allows you to make a significant impact on developing effective treatments for some of the most devastating diseases we face.

Learn More

No matter whether you want to stay in the property for the rest of your life or get rid of it completely, there is a gift option that meets your needs.


Please contact me if you have any questions or are ready to make an investment in our future.

Sincerely,




Gordon Smith, MBA, CFRE


Associate Vice President of Development, Planned Gifts



I was amazed at how easy donating my vacation home to National Jewish Health turned out to be.

— Linda Grabel





Investing in National Jewish Health's Future

Gifts of real estate can be a highly advantageous way to leave a legacy at National Jewish Health. Whether you want to stay in your home for life, just use it for the summer or winter season or get rid of the property altogether, a charitable gift of real estate can fit into your plans.

Learn More!

Have questions? Or are you ready to make a gift of real estate? Fill out the information below to request our Gift Planning Office contact you directly.

First Name (Required):

Last Name (Required):

Email (Required):


Phone Number (Required):

Request More Information

We respect your privacy! The information you share will be kept strictly confidential.

View My Guide

Learn more about the many ways to use real estate to support National Jewish Health. Download your copy of the guide **7 Ways to Donate Real Estate**.



I was amazed at how easy [donating my vacation home] turned out to be.

—Linda Grabel



Focus Your Message

.....

Importance of Estate Planning Documents

Women

45% Very Important
30% Have a Will

.....




Men

41% Very Important
35% Have a Will

.....



To view this email as a web page, click [here](#)

Forward to a friend: 



Dear fName,

If you've put off writing your will or solidifying your plans for the future, you're not alone. Over half of Americans don't have plans to protect the people and causes that matter most to them.

As a valued member of our Creighton community, we care about your future and want to help you achieve the peace of mind that comes with having a plan in place that will benefit you and generations to come. That's why, as part of National Estate Planning Awareness Week, we are offering you a complimentary *Personal Estate Planning Kit*.



Our kit makes estate planning simple. It takes you through the process step-by-step, answering your questions and providing clarity to put together a plan that will benefit you and your family.

Let us help you plan for the future with a complimentary gift. If you have any questions, please don't hesitate to contact me directly.

I'm Here to Help

Mike O'Malley
Director of Estate and Gift Planning
402-280-2169 (w) | 402-332-9853 (m)
giftplanning@creighton.edu
www.creighton.edu



Creighton University | 2500 California Plaza | Omaha, NE 68178

Creighton University respects your online time and privacy.
If you no longer wish to receive this planned giving eNewsletter, please click [unsubscribe](#).

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Make It Personal

.....

Personalized salutation

Number of food insecure people

State specific statistics

State personalization



@Name@
 @Street2@
 @Street@ @Unit@
 @City@ @State@ @Zip@ @Zip4@

Dear Salutation,

The holidays are quickly approaching; the season when families gather and children dream big. For many people living in America, it's a time of abundance—it's also a time of waste.

During the holidays and year-round, an enormous amount of food is wasted in the United States. The food supply chain alone wastes about 72 billion pounds of healthy food each year. This, while 42 million people struggle with hunger—including [# of food insecure persons] people living in [state]. So while you may not realize it, you likely know someone who doesn't have enough to eat.

You can help. This holiday season, give a gift from your will to Feeding America®.

At Feeding America, we're working hard to end hunger—in [state] and throughout the country. But a hunger-free America won't happen overnight. That's why I'm asking you to make a powerful, long-term commitment to bring nutritious food to people in need. Your future gift will fortify a network of more than 200 foodbanks. And you'll advance our food rescue program, which puts nutritious food destined for waste into the hands of people facing hunger.

I hope you enjoy the enclosed issue of ***Fighting Hunger Today and Tomorrow***, which shows how you can help lift the burden of hunger for future generations.

Thank you for all that you do for Feeding America. You make our work possible.

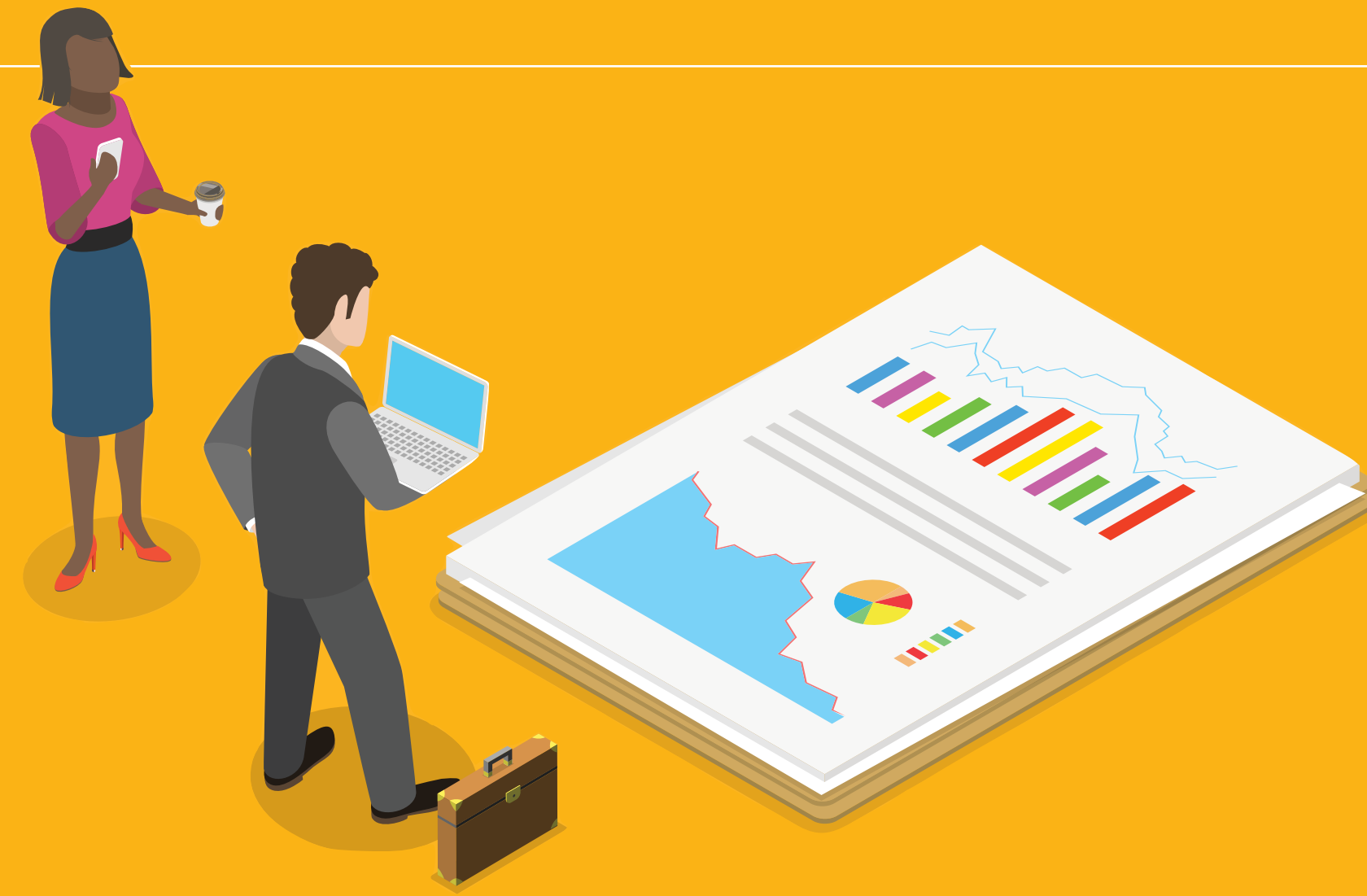
Sincerely,

Jessica Noe
 Senior Manager, Development
 and Planned Giving

National Office
 35 E. Wacker Drive
 Suite 2000
 Chicago, IL 60601
 tel 312.641.5593
 feedingamerica.org



P.S. Do you know someone who feels passionate about ending hunger in America? Honor them with a gift from your will. Learn more in our free guide, *Give From the Heart With a Tribute Gift*. Simply return the enclosed reply card today!



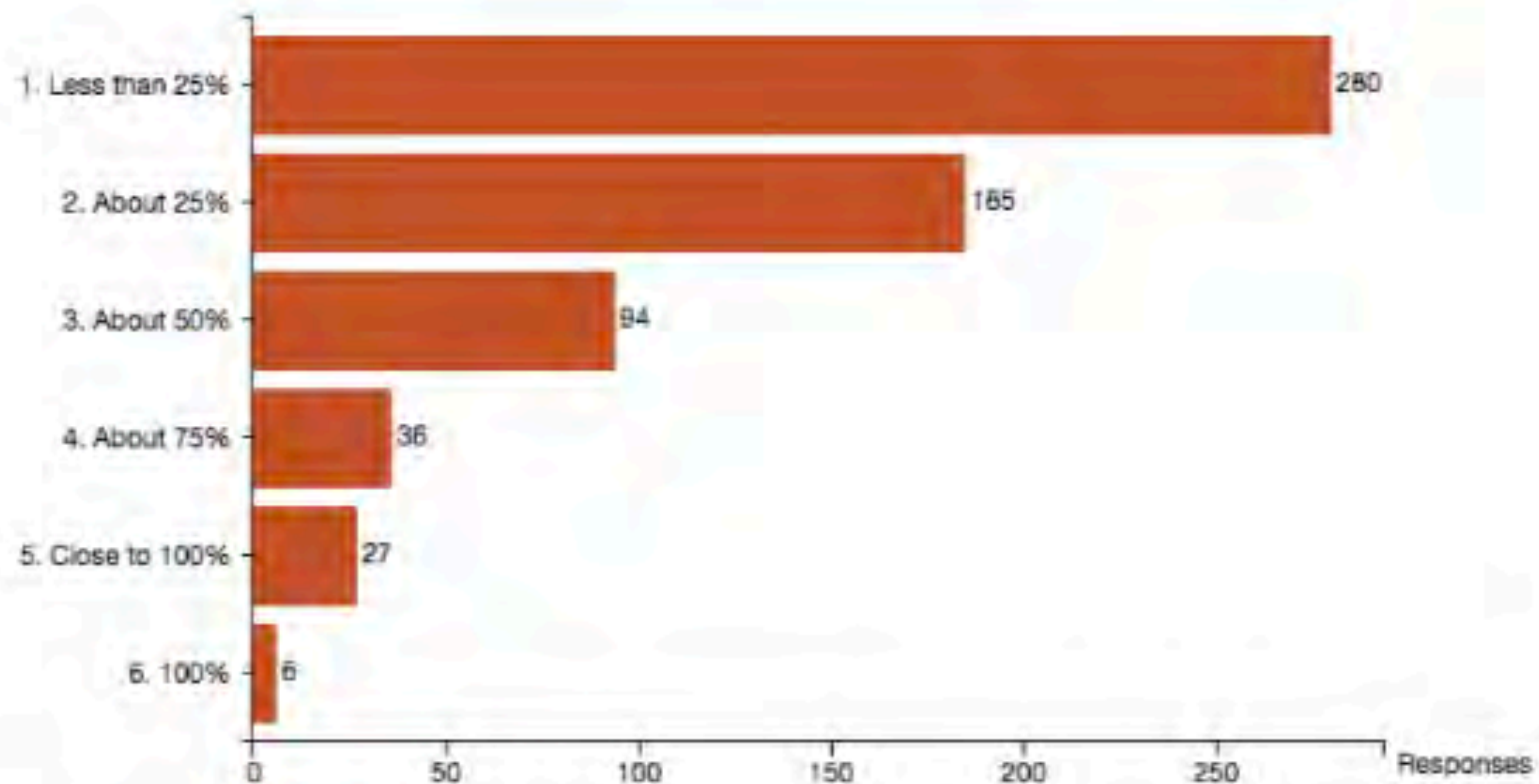
SEGMENT AND TARGET WITH **New Marketing Tools**

.....

Planned Giving Survey

- Low hanging fruit
- Build your pipeline
- One on one discovery
- Understanding donor affinity
- Shortened feedback loop



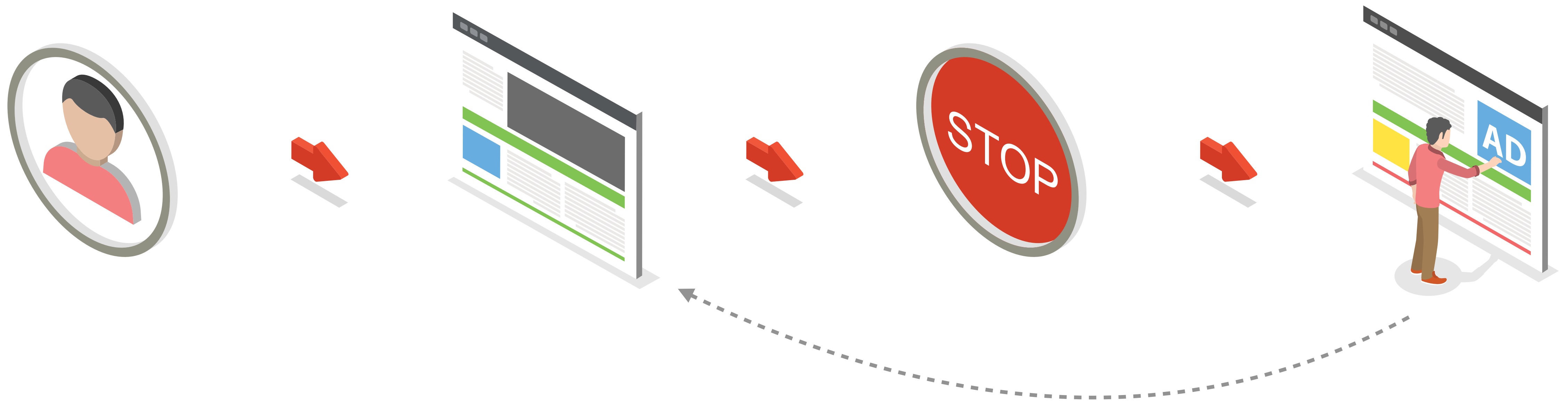
10. 7. Approximately how much of your annual charitable giving goes to Best Friends?

Behavioral Marketing Defined

“**Behavioral Marketing** leverages known online user information and behavior in order to deliver a tailored message, offers information to that user in a timely and relevant manner.”







Simple Use Case



Behavioral Marketing

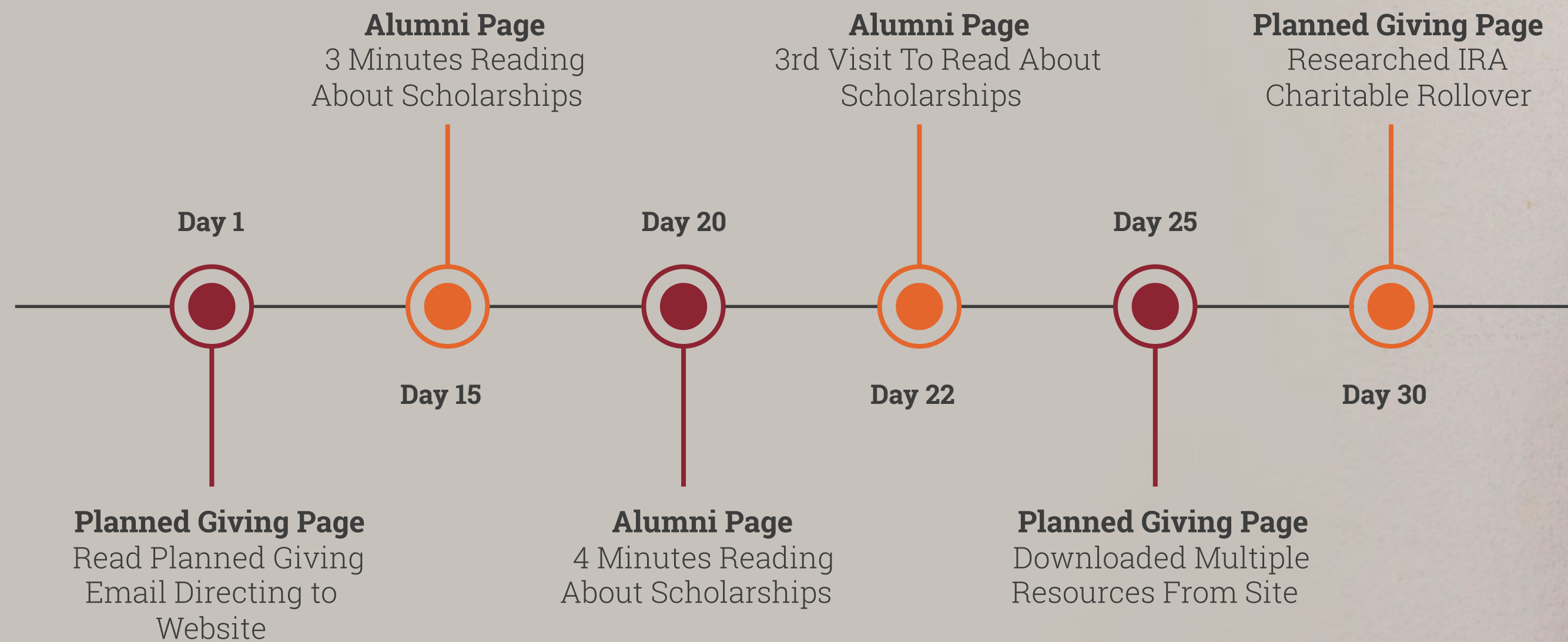
Would Amy Be On Your Planned Giving Radar?

-  **Graduated in 1990**
-  **Last Gift Date is 2013**
-  **Lifetime Giving <\$2,500**
-  **Never Assigned**



Behavioral Marketing

Never Miss a Planned Giving Opportunity Again



Behavioral Marketing



FREE Planning Tool!

Our gift to you during Estate Planning Awareness Week:

[GET MY GUIDE »](#)

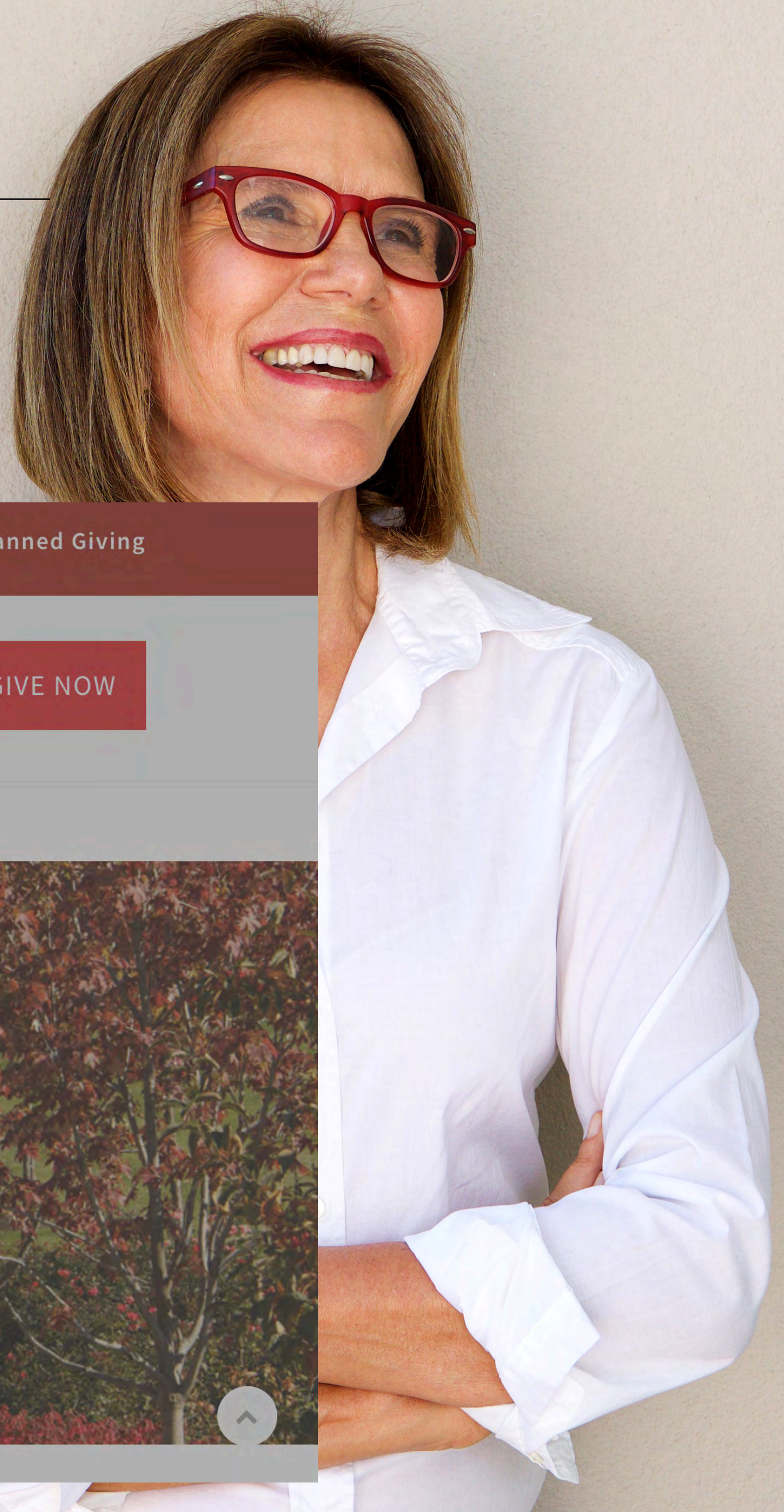



Time Is Running Out!

Make a tax-free gift from your IRA.

[SEE MY TAX BENEFITS »](#)

Behavioral Marketing



 Rensselaer

Donors | Corporations and Foundations | Planned Giving

INSTITUTE ADVANCEMENT
Rensselaer Giving

POPULAR GIFTS INCOME GIFTS SMA

How Can We Help?

We Are Pleased to Offer Estate Planning

Resources to Alumni, Friends and Parents at RPI

We would like more information on:

✓ Please Select

- Beginning my Estate Planning Process
- Estate Planning Strategies
- Documenting RPI in My Estate Plans
- General Estate Planning Assistance

Last Name:

Email:

Send

GIVE NOW

Planned Giving



**What Medium
Works for You?**



**Focus Your
Messaging**



**Be Open to New
Channels**

1

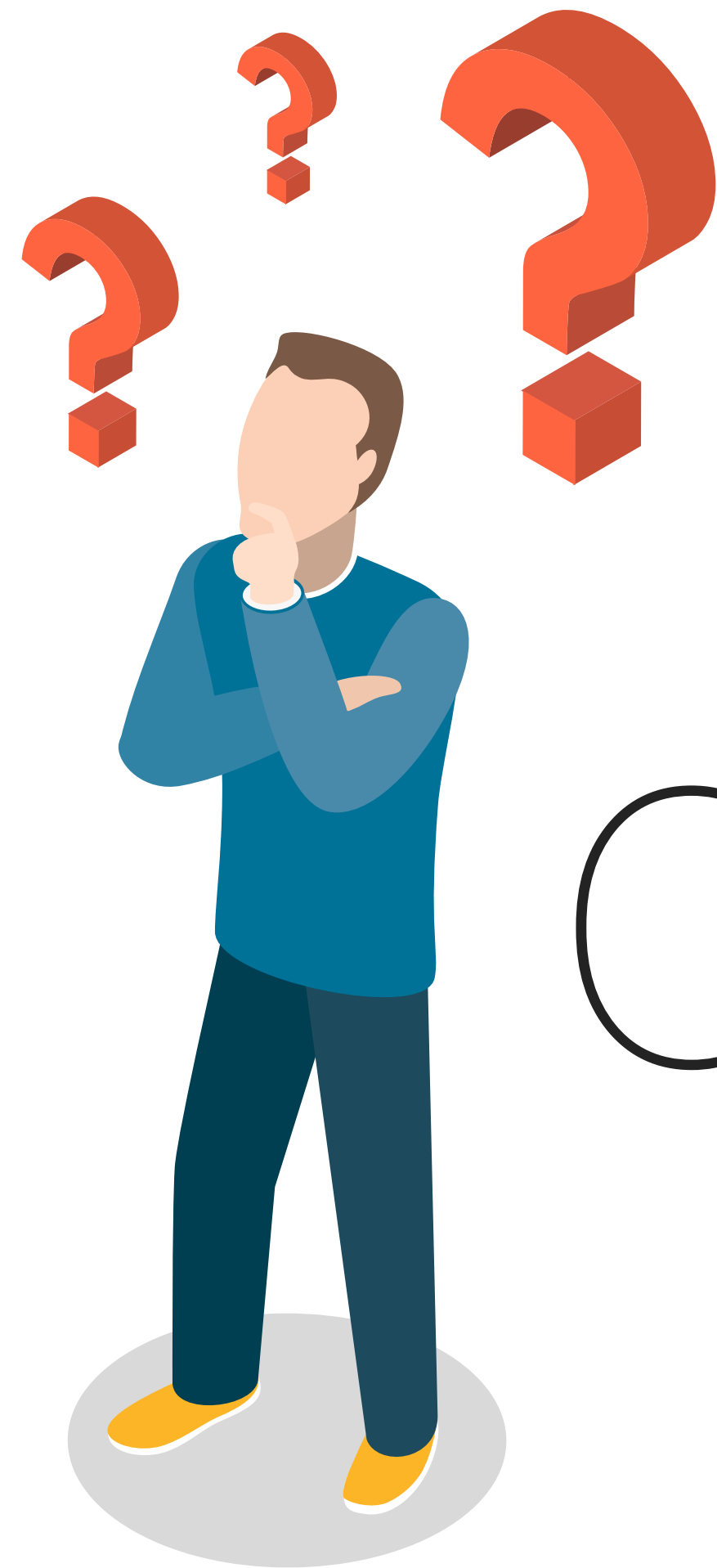
**Understand the
Change That Is
Happening**

2

**The Donor
Pyramid,
Journey and
Decision-
Making Process
are Changing**

3

**Understand the
Tools Available
and Look
Forward**



Questions?



Katie Parker

Editorial Director

The Stelter Company

katie.parker@stelter.com

blog.stelter.com