

Marketing Gifts of Real Estate

Northwest Planned Giving Roundtable
July 21, 2022



Why Real Estate?

- 43% of wealth in USA
- Options to receive life income or life estate
- Tax benefits for our donors
- Appreciated Market Values

Communications

- Website / Brochure
- Newsletter
- Donor Stories & Testimonials
- Display Ads
- Email Blasts

Real Estate

Transforming Realty to Gift Reality

Want to make a gift to Oregon Health & Science University Foundation or Doernbecher Children's Hospital without touching your bank account? Consider giving us real estate, such as a personal residence, vacation home, farm, commercial property, or undeveloped land. Such a generous gift helps us continue our work for years to come. And a gift of real estate also helps you. When you give Oregon Health & Science University Foundation or Doernbecher Children's Hospital appreciated property you have held longer than one year, you qualify for a federal income tax charitable deduction and you may minimize or eliminate capital gains tax. And you no longer have to deal with that property's maintenance costs, property taxes, or insurance.

Another benefit: You don't have to hassle with selling the real estate. You can deed the property directly to OHSU or Doernbecher or ask your attorney to add a few sentences in your will or trust agreement.

Ways to Give Real Estate

You can give real estate to OHSU or Doernbecher in the following ways:

Think Twice Before You Put Out the For Sale Sign

Consider a Gift of Real Estate

Imagine avoiding the hassle of selling a piece of property, with no worry about getting a fair price, and at the same time helping to support Oregon Health & Science University Foundation or Doernbecher Children's Hospital all while qualifying for a federal income tax charitable deduction.

This can be your reality when you consider using real estate to make a gift to OHSU or Doernbecher.

Why Donate Real Estate?

Depending on the method you choose, a gift of real estate to Oregon Health & Science University Foundation or Doernbecher Children's Hospital may allow you to:

1. Make a significant gift to OHSU or Doernbecher.

2. Qualify for an income tax charitable deduction.

3. Reduce or eliminate capital gains tax.

4. Pay no gift tax on the transfer.

5. Reduce your estate administration expenses.

A gift of real estate can be completed in a variety of ways. Keep reading for some examples.

Key Messages

1. Our organization accepts donations of real estate if they meet our acceptance requirements
2. We offer options for donors to receive life income or life estate
3. Donating real estate directly to charity can provide certain tax benefits to donors, and reduce the cost of donation

Marketing Donations of Real Estate

EXISTING

- Website / Brochure
- Newsletter
- Donor Stories
- Display Ads
- Email Blasts

NEW

1. Digital
2. Updated Web & Print Content
3. Advisors
4. Direct Mail

Digital

| Social | SEO | SEM |
|--|--|---|
| Posting on your own fb, LinkedIn, Instagram or other social media platform | Organically drive traffic to your website primarily through Google | Using paid methods (ads or search promotions) to appear in searches |
| Low-cost (free) | Need an expert | Can get expensive |
| Challenge to keep content fresh | Slower to see results but high potential reach | Quicker results |



STRATEGY

Deploy paid display & social advertising that builds awareness for OHSU Foundation, and drives traffic to planned giving website



OBJECTIVES

Educate and engage new audience to learn more about OHSU planned giving, and; **generate** potential leads for new planned gifts



KPIs

of impressions, reach, link clicks, # of landing page visits, received interest forms or leads



AUDIENCE

Target users with criteria such as interests, location, age, gender; promoting ads to appear in social media feed (Portland (+25 mi) Oregon, 50 – 65+)

ASSETS

Support a healthier future.

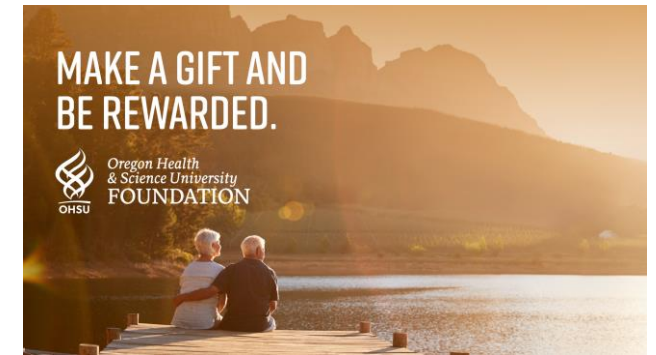
Through bequests, life insurance and retirement plans, you can give a gift that lasts at OHSU. Designate a future gift today.

Make a gift and be rewarded.

Create a healthier future and income for your loved ones: Support OHSU with a gift annuity or charitable remainder trust.

Together, we create a healthier future.

Include OHSU or OHSU Doernbecher Children's Hospital in your estate plan and improve the health of our community and beyond.



SUMMARY

As of Monday, March 21



| IMPRESSIONS | REACH | LINK CLICKS |
|--|--|--|
| The number of times that our content was displayed to users. Can be organic or paid. | The total number of people who see your content. | The number of times that users clicked on links from your posts during the reporting period. |
| 1,134,228 M | - | 742 |
| 38,199 | 15,531 | 200 |
| 34,380 | - | 371 |

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- 1. Update Web & Print Content**
- 2. Direct Mail**
- 3. Advisors**
4. Digital

Questions?

Thank you for your attention!

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