

BUILDING A SUCCESSFUL PLANNED GIVING PROGRAM



Oregon State University
Foundation

AGENDA

I'LL SHARE HOW TO BUILD A PLANNED GIVING
PROGRAM: WHY, WHAT AND HOW?

What Is Planned Giving

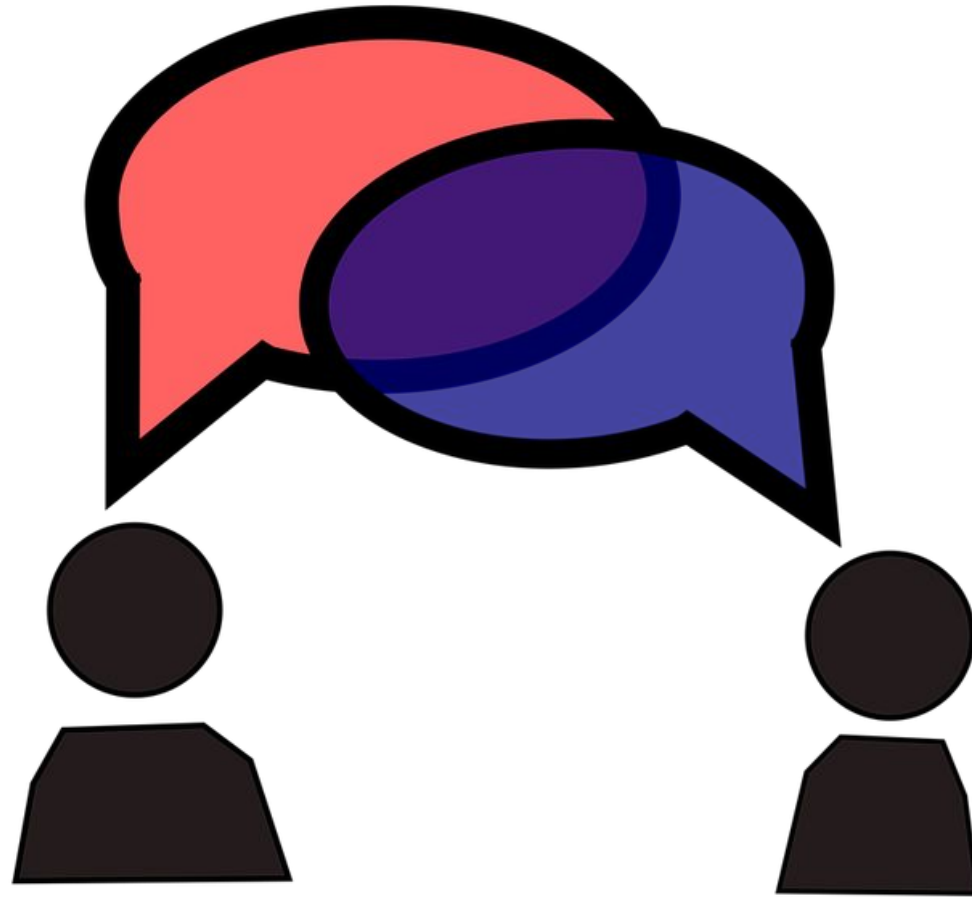


- Definition
- Why donors make planned gifts
- A charity's retirement account
- Benefits to Donor
- Keep it simple

WHO MAKES GREAT PLANNED GIVING PROSPECTS?



HOW TO HAVE PLANNED GIVING CONVERSATIONS



STATEMENT OF INTENT





Confirmation of your George Fox University Legacy Gift

Please complete this form to share the details of the planned gift you have established to benefit the university. By providing this information:

- You will become a member of the Henry Mills Society.
- We will be able to celebrate your gift and thank you for your generosity.
- We will ensure your gift is used in accordance with your wishes.

Name _____ Date of Birth _____

Name (if joint gift) _____ Date of Birth _____

Mailing Address _____

Best phone numbers to reach you: _____

Email: _____ Email: _____

George Fox alumni? Y/N _____ Year(s) _____

Please describe the source of your gift.

☐ Will or Revocable Living Trust

☐ IRA, Retirement, or Investment Account (Administrator): _____

☐ Donor-Advised Fund Remainder (Administrator): _____

☐ Life Insurance Policy (Issuer): _____

☐ Other (Please specify): _____

We respectfully request a copy of your gift documentation for our records.

The estimated value of your gift to George Fox University: \$ _____ Or

George Fox University's portion of your estate: _____ %

If a percentage, the approximate estimated value today: \$ _____

Note: _____

Designation of Commitment:

☐ My gift is for the George Fox endowment to be used for university needs.

☐ I intend my gift to support: _____

An endowed scholarship for: _____

Note: Your scholarship will be documented on an Estate Endowed Scholarship Fund Agreement.

If funds are unable to be used as outlined above, then the George Fox University Board of Trustees may determine with its sole discretion a modified purpose for the use of these funds that is consistent with the donor's original intent.

☐ Feel free to profile this gift intention in a future George Fox publication to inspire others.

☐ We would like our gift to remain anonymous.

Signature: _____ Date: _____

Signature (if joint gift) _____ Date: _____

This document does not bind you or your estate. By signing this form, you are acknowledging your current plans to benefit George Fox University in the future. We respectfully request notification of changes in the value and type of your gift. All information and supporting documents will be kept private and confidential.

THANK YOU for including George Fox University in your estate plans.
We are grateful for your generosity.

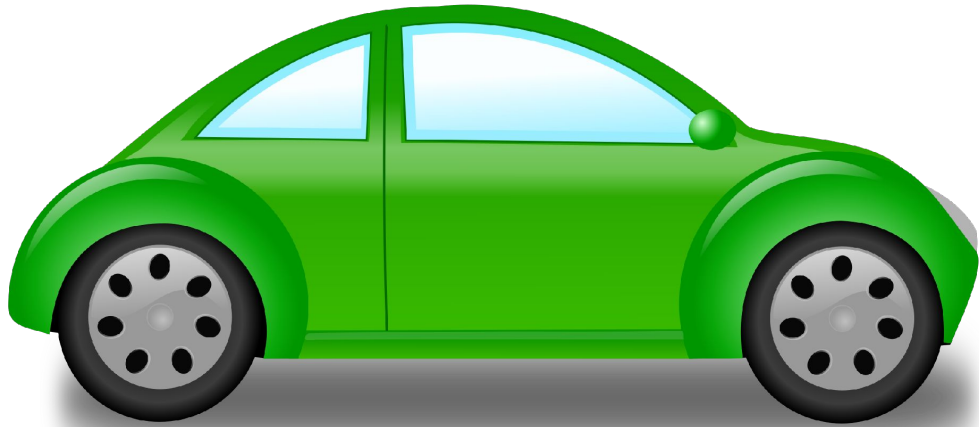
For Office Use Only:

This gift is gratefully accepted by the authorized representative of the University as evidenced by the signature below.

Signature: _____ Date: _____

University Title: _____

THE MOST COMMON PLANNED GIVING VEHICLES



- Bequests
- Retirement Account Beneficiary Designations
- Investment and Brokerage Accounts
- Life Income Gifts
- Real Estate Gifts

LEGACY SOCIETY





CONCLUSION

- It's the retirement account for non-profits.
- Start small and build
- One gift can create a significant change for an organization
- Stay the course; estate gifts can take a long time

The End

THANK YOU!

QUESTIONS?



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