



# STEWARDSHIP OF PLANNED GIVING DONORS

PG CALC WEBINAR

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## I. INTRODUCTION

All non-profits should be interested in nurturing planned gifts to their organization. A planned gift through a bequest in a will or revocable living trust, beneficiary designation, gift annuity, charitable remainder trust, etc., is often a donor's largest gift to a non-profit. It is not uncommon for bequest gifts to be 10 to 20 times the size of a donor's average annual gift, with many gifts being even higher multiples. Because of the larger gift size and because planned giving builds upon previous cultivation actions, it is arguably the most cost-efficient fundraising a non-profit can undertake.

A non-profit that has a positive image and has been around for a while will receive planned gifts, mainly bequest gifts, from time to time without particular effort on its part. However, it will realize a much greater number of planned gifts and larger gift amounts if it seeks out these types of gifts *and stewards the donors who make them*.

This paper begins with a discussion of why stewardship is so important in developing a strong planned giving program and in maximizing your donors' overall gift potential. This sets the stage for the next two sections about "tried and true" stewardship activities utilized by various non-profits and taking an expanded view of what is meant by stewardship. The paper closes with a discussion of some special considerations to keep in mind as you steward your planned giving donors.

By the end, it is our hope that you will be more enthusiastic about the potential benefits of good stewardship, energized to try some new activities with your donors and ready to share the joy a planned gift should engender at your non-profit.

## II. Stewardship Matters

The goals of planned giving stewardship are very similar to stewardship of other types of gifts: 1) to recognize and honor donor gift commitments, and 2) to deepen donor understanding of, and engagement with, the non-profit. However, there is a third goal unique to planned giving: retention of the gift arrangement. Most of planned gifts are *revocable*, meaning they can be increased or decreased or taken away entirely during the donor's lifetime.

### A. "Count it and forget it" Doesn't Work

Despite the fact that every planned giving fundraiser had stories to tell of donors who they either 1) lost due to lack of stewardship (by their predecessors, of course) or 2) gained due to neglect by other non-profits, it has been commonly held in the development community that the large majority of bequest donors do not change their gift plans once they name a non-profit in their

will. This belief has sometimes been cited as a reason to forego planned giving stewardship or to slash the stewardship budget. One possible source for this position is a survey of planned giving donors conducted in the year 2000 by NCPG (now Partnership for Philanthropic Planning). The NCPG survey asked donors with a charitable bequest in their will or living trust, “Has the amount of the charitable bequest ever increased or decreased?” Fewer than 1 in 10 of the respondents chose “Amount Decreased”, from which may have grown the conclusion that fewer than 10% of planned bequest donors change their charitable plans.

However, recent research by Russell James, J.D., Ph.D., CFP, Director of Graduate Studies in Charitable Planning at Texas Tech University, has caused everyone to look more closely at that conclusion and to begin thinking otherwise. Dr. James points out that what the answer really says is that IF charity stayed in the will or living trust, changes to the plan decreased the total charitable amount 10 percent of the time. The question was asked at only one point in time and of donors that still had charity in their plans. It doesn’t look at what happens over time or capture donors that might have removed charity completely. The most accurate way to test this question is to look at plan changes over time, utilizing a lifetime survey.

As part of a larger study on health and retirement issues\*, Dr. James has been able to do just this. In particular, he was able to look at reported retention rates over groups of 10-year periods. In other words, among those who reported a charitable plan in the initial year and answered the same question 10 years later, what percentage still report having a charitable plan?

Results from five groupings of 10 years each, within the time span 1993 to 2012, were **retention rates between 50 to 60 percent**. The majority of donors kept charitable gifts in their plan but at a far lower rate than the heretofore proclaimed 90 percent. Further, when Dr. James looked at the “charitable plan loss trajectory,” he found that for donors who had a charitable component in **both** 1998 and 2000, by 2002 that percentage had dropped to about 82% and it continued to decrease over the years until it reached 65% in 2012.

*\* A large, federally-funded, longitudinal, in-person, well-compensated, nationally representative, study since 1992.*

Bar charts created by Dr. James showing these findings are in [Appendix A](#).

Clearly it is important for charities to practice good stewardship if they wish to be retained in the final plans of their donors. However, beyond simply staying in the will or living trust, a non-profit can lose out on increasing the size of the planned gift, acquiring additional planned gifts, and larger outright gifts if it neglects stewardship.

### **B. Intergenerational Gifts**

With proper stewardship of donors, it is not uncommon for other family members to make their own gifts. Family members influence one another and often will share the same interests and values. One generation gives in honor of another generation (usually younger to older) or to continue a family tradition of support.

An example of this is found with KCTS 9. Mrs. Johnson notified KCTS 9 that she had included the station in her will. When the fundraiser thanked her and began telling her about the Legacy Circle and its member benefits, the donor replied, “I know all about that from my daughter Mary!” Mary had notified KCTS 9 some months before that she had included the station in her estate plans. She was offered a visit but that did not work out due to timing and other issues. However, other stewardship ensued. The development officer sent her a Legacy Circle welcome package with a Legacy Circle certificate, planned giving mailings and e-mails, invitations to station events and offerings, and had interactions on the telephone. While Mary never took advantage of any of the invitations or offers of a visit, she clearly was sharing all of that information with her mother. Epilogue: the mother and daughter were later featured together in a donor story centered on a family legacy of support.

### **C. Multiple Planned Gifts**

It is said for good reason that your best prospect for a planned gift is a current planned giving donor. Sometimes donors are testing the waters when they make their initial planned gift, with the intention to increase the gift or make another depending on how the gift goes and how they are treated. This is seen quite often with gift annuity donors where multiple annuities by a single donor or donor couple are not uncommon. Even a charity with a modest gift annuity program had a donor with seven gift annuities, another with four annuities and several others with two gift annuities each.

Other donors may not have the intention to do more at the beginning but, as they grow closer to your organization and learn more about different ways to give, will add planned gifts to their portfolio of giving. One charity in Seattle refers to these donors as “planned gift collectors.” At KCTS 9, a married couple began by funding a single-life gift annuity for the wife. As they became more involved, the couple funded a single-life annuity for the husband, then two additional single-life annuities for the wife, included KCTS 9 in the wife’s will, and named KCTS 9 as a beneficiary of the wife’s retirement assets. Their most recent planned gift was a joint-life annuity.

### D. Increased Size of Planned Gifts

As mentioned earlier, many planned gifts are not set in stone and can be increased (or decreased) during the lifetime of the donor. One example of this outcome is a planned giving donor to KCTS 9. The donor was an active volunteer with the station and he informed them that he had arranged a bequest in his will to KCTS 9. Stewardship ensued and after the donor was featured in several planned giving marketing pieces, both print and on-air, he informed KCTS 9 that he had doubled the size of his bequest. By explaining his commitment to the station with the wider KCTS 9 viewer community, the donor felt a special and increased connection which led to the larger gift. The fact that he was recognized when out in public was an added bonus for the donor!

### E. Increase in Outright Giving

Sometimes non-profits are reluctant to invest in planned giving because they are afraid that it will have a negative impact on annual giving. While experienced fundraisers knew the fallacy of this assertion\*, there has been recent research that bears out anecdotal experience. As part of the same study referenced above, Dr. Russell James has shown that annual giving **increases** after adding a charitable beneficiary to the estate plan. His findings regarding pre- and post- annual giving levels are from 9,439 observations from the longitudinal study and are expressed in constant (inflation adjusted) 2012 dollars:

- Average annual giving over 8 year period **pre-plan: \$4,210**
- Average annual giving over 8 year period **post-plan: \$7,381**

Once again, bar charts created by Dr. James showing these findings are in [Appendix A](#).

Dr. James' study does not identify the specific reasons why the annual giving increased after a planned gift was arranged. But it seems a fair supposition that planned giving stewardship played a significant role in this increase. For one, the simple fact of additional touches can only add to a donor's sense of attachment to and satisfaction with an organization. And two, in many instances the planned giving donors may not have been receiving much stewardship from the non-profit prior to their planned gift because of the modesty of their annual giving.

\* For example, the annual giving manager (membership) at KCTS 9 public television would look closely at significant increases in a donor's giving. She told the planned giving fundraiser that such increases frequently followed contacts by the planned giving office.

### F. Acceleration of Deferred Gift

Most planned gifts are end-of-life gifts meaning they are not made until the donor passes away. Sometimes planned giving donors will decide to accelerate their planned gift. They realize they can do without the money and are inspired by the non-profit's work and so contribute now what was previously intended to be left via their will. If they feel they cannot give up the money completely, other donors decide to use the funds to implement a life income plan. This benefits the charity as it turns a revocable gift into an irrevocable one and, in the case of a gift annuity, the non-profit has access to the funds right away. It is unlikely that either of these scenarios would occur without contact and stewardship from the planned giving side.

A case in point is a long-term supporter of KCTS 9 who set up two charitable gift annuities and eventually notified the organization that she had left a bequest in her will. Through a combination of major gift and planned giving stewardship, she attended and enjoyed numerous events, often bringing friends with her. She received regular communications including newsletters and quarterly "Insider Letters," as well as telephone calls and the occasional visit. Eventually, she contacted the planned giving officer to say that she was accelerating her bequest and wanted to establish an endowed fund during her lifetime, for \$500,000. The donor explained that this would be her final gift and that KCTS 9 would not receive a separate bequest or any further annual gifts. While the planned giving officer worked with the donor on the endowed fund, she was thanked by leadership staff and board members. Interestingly, a few months later KCTS 9 received a check from the donor for \$25,000 with a note that this was her annual contribution! The director of development and the planned giving officer called and thanked the donor. Upon reminding her that she had intended to not make any further annual gifts, the donor laughed and said she had forgotten about that and to cash the check. More gifts to come?

## III. Stewardship Activities

Oftentimes, when a non-profit begins to think about the stewardship of its planned giving donors, it starts and stops with the idea of an annual event, such as a legacy lunch or dinner. While such an event can be a very good stewardship tool, it is not feasible for every non-profit. And even when a non-profit does host such an event, it should not consider this sole stewardship activity to sufficient. If the organization then puts a checkmark next to "Stewardship" it will not realize the full potential from stewardship and might find that, without more, the attendance at the annual event will decline over time.

### A. Create a Planned Gift Recognition Society

A legacy society (a.k.a., heritage society) is not an absolute necessity for a planned giving program. Stewardship can certainly be done through the usual means without one. However, it

has become a best practice in planned giving for several reasons.

A legacy society:

- Formalizes stewardship and ensures that it happens. Too often planned giving donors fall between the cracks at a non-profit and the only time the donor hears from the non-profit is a thank you upon notification (sometimes not even that!). One non-profit had the experience of hearing from a donor that they had been named in his will, only to discover upon searching the records that this donor had informed them of this gift twice before. It wasn't clear if thank-you's had been sent upon these prior notifications; certainly no contact had been made since then, with the non-profit losing track of his gift in between times.
- Creates an identity and, if done correctly, helps the donor to feel a part of something special. Seeing themselves as a part of like-minded community helps reinforce the gift decision and helps them feel good about arranging it.
- Provides the means of recognizing your planned giving donors. What does it say if a non-profit offers all sorts of giving levels, clubs, and recognition opportunities for donors of outright gifts but is silent for those who name the non-profit in their estate plans? While some donors will say they do not want the organization to make a fuss (ask if they are being completely honest), many others like the attention.

Legal Voice, a small nonprofit, initiated a planned giving program three years ago. In the initial phase, they surveyed planned giving donors about whether they wanted any recognition and/or an annual event. The response was overwhelming "no". This year all the planned giving donors were invited to the home of the CEO for a cocktail party and almost everyone attended in spite of their expressed opinions to the otherwise!

- Can be a very useful tool for initiating planned giving conversations and promoting planned gifts generally.

So if a non-profit is intent on increasing its number of planned gifts, it should most often look to the day when it will establish a legacy society of its own. Here are some considerations in doing so.

### 1. Membership Criteria

Legacy societies add value by providing a mechanism for deepening and strengthening the relationship planned giving donors have to your non-profit. There is only an upside to being as inclusive as possible and very little, if any, downside.

This means that all planned gift donors should be counted as members, regardless of gift size or if it is a contingent gift. By including a non-profit in his or her estate plans, the donor has shown a commitment to the non-profit and a desire to leave a legacy. Beyond being the right



thing to do, greater contact and stewardship through a legacy society will help small gifts to grow and contingent gifts to become certain gifts.

While it is a very good idea to eventually obtain a copy of the gift documentation, or the relevant portion thereof, do not make this an initial requirement. Donors are sometimes reluctant to share these and only harm can be done by excluding them on this basis. You will lose opportunities for stewardship and you may alienate donors by communicating a lack of trust or being seen as too intrusive.

Instead, focus on having something in the file that is written and memorializes the gift. Next best to the actual gift documents is a “gift notification form” that provides basic information about the gift (including an approximate indication of gift size), notes any restriction as to use, and gives permission to be recognized publicly. (See [Appendix B](#) for examples of such a form.) However, any written indication from the donor should be acceptable, be it an e-mail, a letter, or the like. If it is an oral commitment and no gift notification form is forthcoming, compose a letter to the donor that expresses your understanding of the gift. You may or may not want to ask for the donor’s signature at the bottom.

With good stewardship, there is a strong likelihood that the donor will eventually share their gift documentation. It helps to let donors know the information will be kept confidential and that your purpose in asking is to make sure their gift can be carried out as desired. It serves both the donor and the non-profit to make sure that 1) the intended organization is identified correctly, which is especially important for non-profits with different branches or offices, 2) you can meet any gift specifications or restrictions, and 3) any possible confusion down the road is minimized.

## 2. Membership Benefits

A core component of any legacy society is the benefits that will be offered. They do not have to be many in number but they should be done in a way that lets donors know that the non-profit is grateful for their estate gift, helps donors to feel part of a special group, encourages donors to reveal their estate gift plans, and provides opportunities for personal stewardship.

The key is for the non-profit to offer enough to achieve some or all of these goals but at a level that is sustainable given the level of committed internal resources. Think about providing quality over quantity and limiting yourself to providing only those benefits that you can do well. Devote some time to thinking about how these “bread and butter” benefits might best reflect your non-profit and the mission your donors feel so strongly about.



### Common benefits

- **Donor recognition.** Publish names of donors in printed materials, on the website, and in e-mail. List names in a physical space and recognize donors at public events or ceremonies.
- **Membership certificate.** Membership certificates may seem mundane and may not resonate with all of your donors. However, a certain group of donors will be very touched to be recognized in this way, with some proudly displaying the certificate at home. This is a low-cost benefit and so there is little reason not to offer it.

The key is to have the certificate look nice, be on quality paper, and be signed by high level leadership, commonly the Board Chair and/or the President/CEO. The certificate should be branded with your organization's logo/look and/or the legacy society logo. The more personal you can make it to your organization, the better. See Appendix C for some sample certificates. In particular, note the unique approach taken by the Make-A-Wish organization.

- **Membership pin.** This is not quite as common as membership certificates because it is somewhat more expensive to produce. However, once again it is fairly low-cost and will resonate with some donors in particular. It also serves to publicize the legacy society for those times when donors wear it to non-profit functions.

As with the certificate, the key is to have a pin that is nicely done. The Japanese American National Museum has a pin that is cloisonné and is a lovely piece of jewelry, which they present in a jeweler's box. Northwest Harvest, a hunger relief agency, has an attractive but more simple legacy society pin that is attached to the inside flap of their membership packet. Avoid designing pins with too much detail as it does not translate well in the small scale, particularly human faces. Consider your vendor carefully and avoid brassy, cheap looking pins.

- **Memento.** Some non-profits have a memento of membership instead of, or in addition to, a membership pin. These token gifts can remind a donor of your non-profit and serve as evidence to others that he or she supports your organization. Design something that will remind donors of your non-profit each time they see the item, and ideally is useful to the member. (Remember that your target audience is older persons who are very likely in a downsizing mode and do not need more "stuff.")

Some good choices are a coffee mug, drink coasters, a bookmark (especially for libraries and schools), a thumb drive, and/or note cards with mission-related photos.

Consider whether you might want two different mementos to be able to offer the one that would be most meaningful to a particular member. For example, a magnifying glass might be just the thing for your older members while it would not be useful to (and might be a negative) to your younger members.

Less recommended are items such as paperweights, bookends, and plaques. They are heavy to mail and tend towards the “dust gatherer” category. In most cases, it is best to avoid anything that is too expensive - it is more the thought that counts, not the amount of money spent.

Having said all this, the caveat is that what item or items work best will vary between non-profits and their different donor compositions. Take some time to think about what will resonate best with your donors and reflect your non-profit’s character. Ask your legacy society members and prospects on a regular basis what they would most value.

- **Dedicated legacy society [annual] event.** When the time is right, an annual event can be a strong cultivation activity but it is not a focus of this paper. See [Appendix D](#) for information about annual events.

### B. Unique Offering(s)

Whether or not you have a legacy society, think about offering one or two benefits that are unique to your organization, or that would be uniquely valued by your planned giving donors. You might want to develop a group of three to four such offerings so that they can be tailored to the particular individual. Here is a list of ideas with more complete details found in [Appendix E](#).

- Parking privileges
- Access to campus libraries
- Invitations to “special experience” wishes (Make-A-Wish)
- Custom books with mission related photos and quotes. Make-A-Wish Washington and Alaska uses Snapfish, an online photo sharing and products site, to make a “Wish Kids” book with wish quotes and photos at a modest cost. Seattle Children’s Hospital creates a book to use at its annual legacy lunch that contains original poetry and drawings from hospital patients (Snapfish can also be used to create invitations or cards with images from your organization. See: <http://www.snapfish.com/snapfish/fe/photo-books>)
- “Behind the scenes” tours (performing arts organizations)
- Invitations to watch rehearsals
- Invitations to participate in live broadcasts (public radio or television stations)

- Special edition music CD (from a public radio/jazz station)
- Wine release parties (College Wine Academy at a community college)
- Invitation to judge student project presentations
- Event with scholarship or grant recipient(s)
- A bush or flowering shrub planted on the grounds of the non-profit, in the donor's honor
- Personalized quilts from members of the Quilting Club at the benefitting senior center (donors could even choose the fabric squares they wanted)
- Sneak previews of art exhibitions

### C. “Piggyback” on Other Events

Look for opportunities to include planned giving donors in other important events at your organization. This will leverage efforts already taking place internally, give your members greater choices, and reinforce the message that their gift is important to the organization.

If seats are assigned, mix planned giving donors in with other donors, rather than seating them separately. They typically like to interact with other donors and the two groups can influence each other. Major gift donors are exposed to planned giving and planned giving donors may be inspired to increase their outright gifts.

Have a means of distinguishing the planned giving donors from others at the event. Something as simple as stickers on nametags (either color coded or ones made with the legacy society logo) will help donors feel special and will be a conversation starter – others will ask what the sticker means and how they can be members, too. Other non-profits have used ribbons on nametags; a non-profit in Hawaii uses flower leis (mainland non-profits might use lapel flowers such as carnations).

Recognize and acknowledge the planned giving donors at the event, if appropriate. If a donor is being recognized for reaching a certain outright giving level, be sure to mention if they also have a planned gift.

The tendency is to think in terms of organization wide or ‘standard’ donor events. However, there may be opportunities to tie invitations more directly to a donor's particular area of interest. Make sure planned giving donors are on the invitation list for any separate events or gatherings a particular program or unit might be having. An illustration of this idea comes from marketing consultant Phyllis Freedman in her blog a few years ago. She described how she was invited to attend a gala at the Lady Bird Johnson Wildflower Center, a research unit of the University of Texas School of Architecture. She had arranged a bequest gift to the school establishing a scholarship with a stated preference for students connected with the Wildflower Center. She

states, “[The invitation] reminded me of the important connection between the two entities, it made me feel valued and appreciated, it made me feel like an insider and, in this particular case, it made me feel as if the School really knows me personally for having sent me such a relevant message.”

A corollary to inviting donors to events whenever possible is to include planned giving donors in focus groups, surveys, regional gatherings, “coach’s tours,” task forces, and the like. All of these activities help expose them to your non-profit and its work, reinforce their gift decision, and possibly lead to larger gifts than anticipated, both deferred and outright, all at no (or little) additional cost.

### **D. Personal Visits and Phone Calls**

Some of the very best stewardship, provided that time permits and the donor allows it, is regular ongoing personal contact through correspondence, visits, and phone calls. At a minimum, seek to have a personal visit or substantive phone call with each member of your legacy society once a year. Some donors are reluctant to meet. This is where having a reason to visit such as a delivery of the membership certificate, pin, or memento can be helpful. Letting donors know that you will “be in the area” can help donors feel more comfortable with accepting a visit. For those you just can’t reach, consider drop-in visits with a tchotchke you wanted them to have (be prepared with a leave-behind note if no one is home).

We focus on the impact stewardship activities will have on the donor but keep in mind it can be a two-way street. In stewarding your donors you will be refreshed and reminded of the good that is in the world. When you are feeling discouraged or have had a bad day at the office, pick up the phone can call a donor. It will always make you feel better!

### **E. Cards, Notes, E-mails**

Birthday cards are a special way to stay in touch, if you know the donor’s birthday. Actively work to build the number of birthdates you have on record. Most donors will willingly give this information to you during a visit or a call, especially if you tell them it is so you can remember them on their special day (make sure you do so!). Wedding anniversaries are also good occasions to remember with your donors.

You can, of course, send a winter holiday card. However, some non-profits feel it has more impact to send Thanksgiving cards. Others send New Year greetings while another sends Valentine cards (sent by the Planned Giving Committee of the Board). One high school chooses to send a special card each year that corresponds to the school’s anniversary date. Consider having more than just the planned giving officer or staff sign these cards, if at all feasible.

Something to try one year would be to include a nice photo of the planned giving team (or the development team in a small shop).

Send notes as often as is appropriate and as time allows. If your non-profit has been highlighted favorably in the news, send a copy of the article with a short note. If you know the donor's particular area of interest, you can send articles that focus on that. Fred Hutch supplies "hang tags" for each fundraiser so that just a quick note is needed, helping to keep the time required to a minimum. Just a few sentences are needed - it is the thought that counts and not the length of the note. If you know a donor has undergone surgery or hasn't been feeling well, send a note or get-well card to let them know you are thinking of them. If there has been a death in the family, send a sympathy card to express your condolences.

A fundraising colleague relayed a story once that he always drew on in working with donors. A wife of a friend had died. Another friend called him and suggested they visit the widow. The colleague resisted, reluctant to go because, as with many of us, he didn't know what to say. He cared deeply but felt awkward and inadequate to deal with the situation. His friend wisely told him that it doesn't matter what you say -- what matters is that you go and are present. People remember your gesture, not your words.

### **F. Thank for Outright Gifts**

Consider personally thanking planned giving donors when they make annual gifts, as most will do, with either a call or a note. At Fred Hutch, gift reports are sent to fundraisers on a daily basis to facilitate this type of contact. The report includes the name of the assigned fundraiser (if any) which makes it easy to quickly identify the calls one needs to make.

Try to send personal, handwritten notes. It is unusual these days to receive this type of mail and it sends its own message about your level of appreciation. The note doesn't have to be long; it is the gesture that counts. Think about how to add something to the call or the note that will resonate with your donors and that shows the impact of the gift. For instance you might relay a particularly poignant story from another donor. This helps connect the donor with other donors and reminds them of the value of the non-profit to other people. For some great examples, see [Appendix F](#). You might also include a short story and photo about a person served by the organization.

### **G. Donor Stories**

A wonderful stewardship activity is to ask a planned gift donor to be interviewed about their relationship with the non-profit and what motivates their giving. This might be for a newsletter article, a testimonial on the website, or perhaps a printed marketing piece (or all of these!). This activity has a double benefit as it brings the donor closer to the non-profit while also providing

one of the best means of inspiring others to give. An estate planning attorney shared that she was very touched when an organization she donates to asked her for such an interview. Even though she was unsure if she wanted to agree to do this, the fact she was asked was meaningful to her and appreciated.

### **H. Insider Reports**

Some non-profits send “insider reports” of some nature to their members. These are intended to offer unique information or perspective about the non-profit that members wouldn’t receive in another mode. The Manager of Gift Planning from KCTS 9 used a quarterly letter to her planned giving donors (with a modified version for her planned giving prospects) to feature recent news about the station, highlight upcoming offerings of particular interest to her audience, and give a sense of who she is as a person. In addition to building a sense of community, it has helped open the door to donor visits and resulted in some outright gifts. (See [Appendix G](#) for a sample letter.)

### **I. Recognition**

Public recognition offers the double advantage of recognizing donors while building awareness about your program. If donors are reluctant, let them know that public recognition is, in many ways, a second gift to your non-profit as it may inspire others to be equally generous. For many donors, this latter point is an appealing reason to be a member of the legacy society.

Look for as many opportunities to recognize your donors as you can. At a minimum, integrate them into the recognition given to other donors at your organization.

- If you have a physical donor recognition wall, add a section for the legacy society.
- Include them in donor listings in the annual report and other non-profit publications.
- If the non-profit has a planned giving newsletter, highlight new members on a periodic basis.
- Include them on the non-profit’s website.

Georgetown University has sent periodic e-mails announcing the newest members of its legacy society. ACT Theatre in Seattle has offered a “Legacy Society Night” at which the Legacy Society and its members are acknowledged in front of all of the opening night patrons. (This is in addition to their annual legacy society luncheon and takes inviting them to a play one step further.)

A note of caution: show great respect for a donor’s preference for anonymity or confidentiality and consider proactively seeking permission to publish any names. In other words, weigh carefully the pros and cons of not listing anyone’s name without their express permission, versus letting donors know you will list their names unless they “tell you otherwise.”

Another recognition tool that has been used is a video tribute kiosk. This is placed in a public space (e.g., lobby) of the non-profit and plays taped video interviews of planned giving donors. (These interviews can also be posted on the website.)

Decide if the non-profit will distinguish donor recognition, either in terms of donor listings or “perks”, based on gift size. To do so with planned gifts raises several issues. Oftentimes, donors prefer to keep the amount of an estate gift private. Sometimes they do not know what it will be with certainty (e.g., % of the residue of their estate) and are reluctant to mislead by estimating. Even when known, would you count the gift at face value? Would the answer to that depend upon the age of the donor? With life income gifts, would you count the full gift amount or the estimated remainder amount?

Recognizing these difficulties, and building on the desire to create a feeling of community, the most common practice is not to distinguish recognition or benefits based on gift size. However, some non-profits have chosen to do so. The Lyric Opera of Chicago, for instance, has the Bel Canto Benefactors (see: <http://www.lyricopera.org/support/bel-canto-benefactors.aspx>). These are members of the legacy society who have designated one or more planned gifts exceeding \$100,000. They even go a step further and combine this with an annual gift of \$1,000 or more in order to qualify.

### **J. Think Outside the Box**

As you develop relationships with your planned giving donors, opportunities will present themselves to interact with them in meaningful ways and show them that they matter to your non-profit. The important thing is to recognize these opportunities and act on them. A planned giving officer at the Seattle Symphony would often get two tickets for a performance and then take an older donor who was no longer able to attend on his or her own. Not only did this keep the donor in touch with the Symphony and its inspirational music, but it created time (picking up and taking home the donor and the intermission) for them to talk and get to know one another better.

Similarly, at KCTS 9, a planned giving donor had purchased tickets for an event with documentarian Ken Burns and planned to attend the donor reception before the event. By the time the event came around, the donor was no longer able to drive. When the planned giving officer found this out, she picked up the donor and took her to the reception and event. The evening was made even more memorable when the officer locked her keys and cell phone in the car!



### **K. How to Accomplish**

Many suggestions have been made for personal contact with your donors, including annual check-in visits and telephone calls, birthday cards, and gift thank you calls. If your number of planned giving donors is too large to do this with existing staff, think creatively about other ways you might accomplish these activities.

One is to enlist the aid of volunteers. A thank you call when notified of a new planned gift can be a rewarding activity for Development Committee members or general Board members. They could also help in making calls when a known planned giving donor makes an outright gift. Donors will very honored to have attention from such a high level in the organization and Board members will be energized with the positive conversations. Committee members could sign birthday and/or holiday cards.

If there are other fundraisers at your organization, ask if they can assist in meeting your goal of an annual visit with each planned giving donor. They might be able to incorporate such a visit as a part of other visits they are making in the area. Not only does this leverage your time but it might help cover geographic areas you would not be travelling to.

Another consideration is how your planned giving office is structured if you have several staff. Some larger charities have chosen to centralize their stewardship activities as much as possible with a single staff person. There are certain broad or “mass” stewardship activities they can handle, such as production of Insider Reports/quarterly letters or the annual legacy society event. In addition, the stewardship specialist can handle the personal aspects of stewardship for certain donors. Care needs to be taken in reassigning donors but inevitably there will be some that have not formed a strong bond with a particular fundraiser, are fine with a lower level of contact or have consistently declined offers of visits or don’t answer phone calls. This helps ensure that stewardship will take place on a consistent basis, which is not necessarily the case if the numbers assigned to a given fundraiser are too large to be managed in reality. It also frees up the fundraisers to focus on donors that require a higher level of contact and/or are considering an additional gift.

Don’t let paralysis set in and cause you do feel overloaded and to do nothing. In deciding what stewardship activities you will do, plan for success not failure. Start small with the greatest impact activities and add others as your time allows. Realize that you won’t be able to do everything every time, but don’t let that prevent you from taking action every time you can.

### **L. Summary and Example**

The above several pages have lots of details about everything you could be doing for your planned giving donors, to give an idea of the range of possibilities. However, not all non-profits

will do all of these activities. The goal should be to pick the number of activities that can be handled on a consistent basis and will be most meaningful to your donors. In order to achieve as much as possible, start with the small things and look for ways to integrate your bequest stewardship into activities already going on at your non-profit. With just a limited effort you will start to see results.

A very good example of putting this approach into practice is found with Jeanne Galloway, Institutional Development Officer of Bloodworks Northwest (“BWNW”). At the time Jeanne was the single fundraiser at the non-profit dedicated to working with individual donors, with planned giving being just a part of her responsibilities. When she joined BWNW, some planned giving activity had been done and there was a Heritage Society of about 30 members. However, the bequest program had been pretty quiet and not much contact was made with Heritage Society members for a number of years prior to her arrival (not uncommon at non-profits).

Jeanne set out to change this. She started reaching out to donors, making contact via e-mail, phone, and visits. A Heritage Society membership certificate was created, formatted to be a stand-alone document which can be printed on, bright white paper or onto a multi-purpose certificate form that the BWNW Communications team designed for use by various departments (see [Appendix H](#)). The certificate is placed into an inexpensive black frame purchased at a Target-type store.

The BWNW had been holding “Partners in Life” events on a quarterly basis for years in various places around the Puget Sound. The purpose was to celebrate blood donations and invitees included blood donors, blood drive coordinators, and the business sponsors of blood drives. Jeanne’s teammates were open to making some changes when she asked how a planned giving component could be incorporated into these events. They began inviting known Heritage Society members and good bequest prospects (long-time, consistent donors). They prepared a one-page bequest newsletter to distribute at the event, featuring a donor profile, brief information about beneficiary designation gifts, a description of the Heritage Society, and a reply device (see [Appendix I](#)). The program was expanded to include a mention of the Heritage Society, a bequest donor shared her story, and a soft ask was made: “We would like you to think about doing this type of gift.”

As a result of one event in particular, Jeanne was contacted by a family that let her know BWNW was in their will and to say that they were now increasing the gift from 5% to 25%. In addition, there is now discussion around other possible planned gifts.

Another case involved a member of the Heritage Society who had never been visited. Jeanne was in touch with her, establishing a rapport through e-mail communications that eventually led to a personal visit. During the visit, Jeanne presented the donor with a membership certificate. Later, the donor attended a Partners in Life event and met the Director of the Center. The donor later

told Jeanne that she had increased her bequest gift to include a percent of the estate in addition to her existing specific bequest.

### IV. Expand Notion of “Stewardship”

Because of the nature of planned gifts, an expanded conception of planned giving stewardship is necessary. To maximize success, look beyond the usual confines of donor stewardship.

#### A. Donors – When Stewardship Begins

All of the above activities are important and form the core of donor stewardship. However, they focus on what happens after the donor has informed you of their gift intention and they are on your roster of planned giving donors. *In reality, stewardship truly begins before then, at the moment your non-profit is informed of a planned gift expectancy.* How that initial notification is handled is critical and sets the tone with the donor going forward.

Mantra: This gift is extremely important and deserves timely personal attention.

Notice the above statement says the stewardship process begins at the moment the **non-profit** is informed of the planned gift expectancy, not necessarily when the development officer finds out. While often it is the development officer who is the first to know, this is not always the case.

Make sure to train other staff, volunteers, and Board members so that if they are the first to be notified, they know what to say and whom they should relay the information to for follow-up. Think ahead of time about what you want their response to be and devise a system for their timely notification to you.

Moving forward from the moment you become aware of the gift arrangement, determine ahead of time what the follow-up will be and how you will manage donors once you are notified. Have your “thank you/welcome” packet at the ready, having already thought through the wording and signatory of the letter and prepared the reply form. Know who will acknowledge and thank the donor for what.

For example, once notified, a non-profit might take the following steps:

- Contact the donor within 24 hours to personally thank him or her and set up a visit, if possible.
- Send a thank you/legacy society welcome letter with a gift notification form. This is done by the development officer within two-four days of notification. See [Appendix B](#) for sample letters and forms.

- Have the President/CEO or an appropriate Board member contact the donor and thank him or her. This could be by letter or by phone. Many non-profits look for ways to involve their board members in the fundraising process and this is an ideal activity for doing that. If your board member is amenable, a phone call can be more gratifying and offers the opportunity for them to hear firsthand why donors support the non-profit. This should be done within two weeks of notification.
- Enter the gift information into the donor database so it can be readily tracked.

Before making the first call, take a moment to look at your database and learn about your donor. Has the donor given recently? Check on patterns of giving. Has the donor given over a long period of time?

When you call, thank the donor personally not just for the bequest but for yesterday's gift, for last month's gift, or for loyal and longstanding support in general. Also, be sure to thank the donor for sharing with you information about the bequest. In addition, you should:

- Emphasize respect for confidentiality.
- Mention that the donor is now eligible to be a member of your legacy society by virtue of the gift. If no such society exists, don't worry. Say that you will try to keep the donor involved in things that are going on.
- Emphasize that the donor can choose his or her level of involvement.
- Assure the donor that the gift is important no matter how small (or how contingent!).
- Make clear that you can help ensure the donor's wishes are carried out and that you are a resource and would welcome any questions.

Once a donor has been welcomed into a non-profit's community of planned giving donors, the relationship should continue to grow. Indeed, the focus now shifts to deepening that relationship through ongoing contact by cards, phone calls, and personal visits, as described more fully above.

### **B. Donors – When Stewardship Ends**

The usual mindset is that donor stewardship ends when the donor dies and the non-profit is notified of the pending distribution. However, because of the nature of planned gifts, effective stewardship continues beyond the grave.

### Initial Response

Just as it is important to respond promptly and professionally when notified of a gift intention, it is similarly important to do so when notified that a gift has matured. How you respond to a family member's or advisor's notice informing you about an estate gift indicates to them the importance your non-profit attaches to such gifts and their overall management. Respond promptly and provide any requested information.

Send a letter to the personal representative of an estate. Often the personal representative will be a family member or close friend, in which case the letter will include both thanks and condolences. If the personal representative is a professional fiduciary, the letter will be more of a thank you for the services they will be rendering in administering the estate. Also include in the letter contact information for the bequest administrator and encourage them to work directly with that person as the estate moves along.

Send a letter to surviving family members and/or close friends. Express your condolences and your appreciation for the decedent's gift. If you had interactions with the donor while he or she was living, mention these to underscore how important the decedent was to the non-profit. You can gently ask if they would like to share information about the decedent and his or her connection with your non-profit. Remember that this will be a difficult time for the family member or friend and words of kindness and interest about their loved one will be greatly appreciated. The letter should most definitely have a personal tone (versus a form letter); consider a handwritten note or card.

### Ongoing

Properly recognizing the planned gift and honoring the deceased donor (the "decedent") is both the right thing to do and it will encourage other potential planned giving donors. This is done by:

- making sure the gift arrives in a timely way
- making sure the distribution is correct
- making sure the decedent's wishes are carried out and the gift is used appropriately (check for ambiguities and conflicting directions – make it your job to represent the decedent's interests within your institution)
- including biographical information in your files; make sure it is available to the recipients of the gift
- naming the fund or account after the decedent where appropriate
- keeping relatives/Personal Representative informed about the fund and the recipients
- publicizing the gift as an inspiration/example to others
- showing supporters and others that the gift is well used and appreciated

- talking enthusiastically about the gift to your board
- reaching out to friends and relatives upon the decedent's passing

If there are multiple non-profits benefitting from an estate, good stewardship after the death of the donor can result in closer relationships with those non-profits. Actions you might take include:

- sharing resources, knowledge, and costs
- considering joint representation if you need legal counsel
- considering having one non-profit act as agent for others

### C. Family and Friends

Planned giving stewardship should extend to family and friends of the donor. While the donor is living, consider inviting family and friends to certain events. This might include the legacy lunch or perhaps they can be invited to come with the donor to take a backstage tour or other activity. This helps to make the family members and friends more comfortable with the gift the donor is planning to make, minimizing possible future conflict. Also, recognition of the donor for their generosity and foresight will be more meaningful to them if they can have those that matter most to them in attendance. In addition, family and friends might very well share the same values of the donor. Involvement at this stage could help plant the seeds of future gifts to your non-profit with them.

You also want to be sure to consider family and friends when the donor passes away. This is once again because it is the right thing to do and remember that negative words get around. In addition to the initial letters describe above sent upon notification of the matured gift, send thank-you letters after every partial distribution and after the final distribution. Be sure to include information on how the gift will be used, especially important if the decedent specified a particular purpose. It is a good idea to indicate that it is standard practice to publish planned giving donor names and that you would like to do so in this case. This will help flush out any objections that might be made *before* the deed is done.

If the gift was directed to endowment, determine the level of interest the person has in receiving future endowment reports. Even if the gift was unrestricted consider sending a thank-you letter a year or so after the donor's passing with some general report. One medical research institute sends "Research Highlights" that are produced each year, with a letter saying that such achievements are possible because of gifts like the one received from their loved one.

Consider inviting the personal representative, family/friends, and/or the attorney to the annual legacy society event that occurs during the year of the final distribution, as your budget will

allow. Remember that serving as personal representative can be a difficult and often somewhat thankless job and that recognition and celebration of their efforts will be greatly appreciated.

If it is physically feasible, invite the personal representative to visit your non-profit, receive a tour and meet staff, and gain a first-hand look at how the decedent's gift will be used. As the first few months are particularly busy ones for a personal representative (and potentially quite emotional as well), it would be best to wait to extend the invitation until three months or so after they notify you of their appointment. If the personal representative is a family member or friend, chances are that they too have an interest in your non-profit or would be open to developing one.

### Example

With the proper stewardship of family members in addition to the donor, it is not uncommon for multiple generations of a family to make planned gifts. A particularly good illustration of this comes from Seattle Children's Hospital. The story begins with the grandmother of a family, establishing a testamentary charitable remainder trust. All of the assets of the grandmother passed to the trust upon her death, with trust income paid to her three children. When the trust was funded, Children's Hospital recognized the donor and her gift and stewarded the family.

Later, a daughter of the original donor arranged her own bequest gift for fellowships for specialty pediatrics training. Stewardship continued, including recognition of the gift through a donor article. When the daughter passed away and the gift was received, it was used to send 12 doctors to various conferences. Each doctor sent a letter to the family telling them about the training and how it had helped them in their practice.

Moved and impressed from the various stewardship activities, a second sibling (the brother of the daughter) arranged his own bequest gift. He passed away about three years after his sister, resulting in another large gift for the hospital.

Stewardship continued and the tradition of legacy giving to Children's by the family transitioned to the third generation. In particular, a niece liked the stewardship she saw happening with her family's earlier gifts and approached the planned giving officer about setting up a sizeable endowment. The endowment was an outright gift in honor of her mother and supported a program important to her mother. The niece later arranged a bequest gift to support programs she cares about at the hospital.

In addition to the letters from the physicians described above, a few of the larger stewardship activities included:

- A tribute dinner honoring the family. Children's Hospital hosted a dinner at a nice local restaurant and invited all the family members, including grandchildren and great-grandchildren. The planned giving officer talked about the impact of the family giving



overall while the head of the Pediatric Orthopedic department shared the impact of the daughter's gift in particular.

- Recognition at the legacy society lunch. At the annual Guardian Circle lunch, the hospital shares three stories about planned giving donors. In addition, there is a slide show of photos or names of certain donors shown after the main presentation, as a legacy tribute. Donors from the family were featured in two different years.

The planned giving officer involved in all of this stewardship says that the most important factor was that instead of just "checking off the visit box", she got to know the family and their history, the way they think and the values they hold dear. This enabled her to steward the family members with sincerity and in the ways most meaningful to them.

The children of the niece have now made outright gifts to the hospital. Who can say what future gifts they (and other family members) might arrange?

### **D. Professional Advisors**

Professional advisors involved in the gift planning process such as CPAs, accountants, financial advisors, and estate planning attorneys can play a critical role in making planned gifts happen. You want to be cognizant of this and steward them as well as your donors.

Over time you will start to develop relationships with certain advisors. Follow many of the same activities you would do with a donor, such as staying in contact, sending cards when appropriate, congratulating them on a promotion or a job move, etc. Invite them to events happening at your non-profit such as an open house, an anniversary celebration, or "state of the union" talk by your CEO. Offer tours and an opportunity to meet some of the "stars" in your organization.

On a more formal level, you might consider an event organized just for professional advisors. A local theatre annually invites its circle of advisors to attend a final dress rehearsal of a play. The performance is preceded by a reception with a short presentation about the non-profit and the play to be seen that night, with a chance for the advisors to mingle and network with one another.

When a donor has passed away, how you respond to a notice informing you about an estate gift is a good indication of the responsiveness and effectiveness of your non-profit. This is an important opportunity for positive exposure to the advisor community. Respond quickly and enthusiastically. Remember that comparisons may be made. Provide tax identification numbers, and assist in any way that you can. Use this opportunity to tell advisors of the services that your non-profit can provide such as drafting bequest language and preparing illustrations for life income gifts.

If the personal representative of an estate is a professional fiduciary, this is an opportunity for your non-profit to shine and for you to establish (or strengthen) a relationship with a key advisor. Establishing a personal rapport can be particularly helpful when your non-profit is a residual beneficiary, named to receive a piece of property you would prefer be sold on your behalf, and/or there are difficult assets in the estate to be dealt with.

### V. Special Considerations

While there is a great deal of overlap with stewarding outright donors and planned giving donors, there are some special considerations to keep in mind.

For the most part, you will be working with older donors. For your visits or phone calls to go smoothly and be a positive experience for everyone, you should be sensitive of, and accommodating to, the needs of age or frailty. This means you may need to:

- Choose meeting places that are fairly quiet and easily accessible, if you are not meeting in a donor's home
- Be sensitive to schedules and know that last minute medical matters might arise (for this reason it is good to reconfirm your visit appointment earlier that same day)
- Speak carefully and slowly, and when leaving phone messages be sure to repeat your name and phone number
- Walk more slowly, offer a hand or an arm
- Put everything in writing, in larger font
- Consider your vehicle, if you are picking up the donor

Remember that your donors may be from a different generation and have social mores that might be different from yours. In particular:

- Judiciously, address by "Mr." or "Mrs." and not first name, until the donor indicates otherwise. Use "Ms." when the donor's marital status is not clear
- Stand up when the donor enters the room
- Write thank you notes and send them promptly
- When introducing your donor to others, introduce the older to the younger

Listening to your donors will be among the greatest gifts you can give them. When you set up visits, be sure to allow sufficient time so that you don't have to hurry the donor, particularly with the initial visit. However, recognize that there are limits – you can't have a long conversation every time you see someone. Learn the art of directing the conversation and gracefully bringing it to a close.

By remembering your organization in his or her will, a donor has in some respects elevated your cause to the status of family or closest friend. Development officers may be invited to birthday parties, retirement celebrations, and other major events in their lives. Participate with gladness, celebrate milestones, and when needed, provide support and sympathy. Find the small gestures that say “You are an important and unique member of our community.” At lunch one day, a donor revealed that she was deeply fond of the work of a certain architect. Within a month, the planned giving officer was at the post office and saw a pane of stamps depicting some of the architect’s work. She bought the stamps and mailed them to the donor with a note, and the donor was pleased far beyond the value of a sheet of stamps.

If you can develop a genuine, appreciative relationship with your donors, both you and they will benefit. These long-term relationships can be the most personally and professionally rewarding for you as the planned giving officer, and they should be rewarding for anyone who has expressed such commitment to your organization.

A wonderful illustration of finding the joy in giving and sharing that with your donors is a video put together by Bowling Green State University in Ohio. The video was created to commemorate the opening of BGSU’s new arena and to thank all the donors that helped make it a reality. It can be found on YouTube at: <https://www.youtube.com/watch?v=YxNJJgs08Xg> or by searching the YouTube site for “Bowling Green State University” and choosing the Stroh Center Rap.

## VI. SUMMARY

With an estate gift, a donor has arranged her final and perhaps largest ever gift to your non-profit. Through proper stewardship you can ensure that this decision is a life-affirming one for the donor and remains in place, or perhaps even grows in the process.

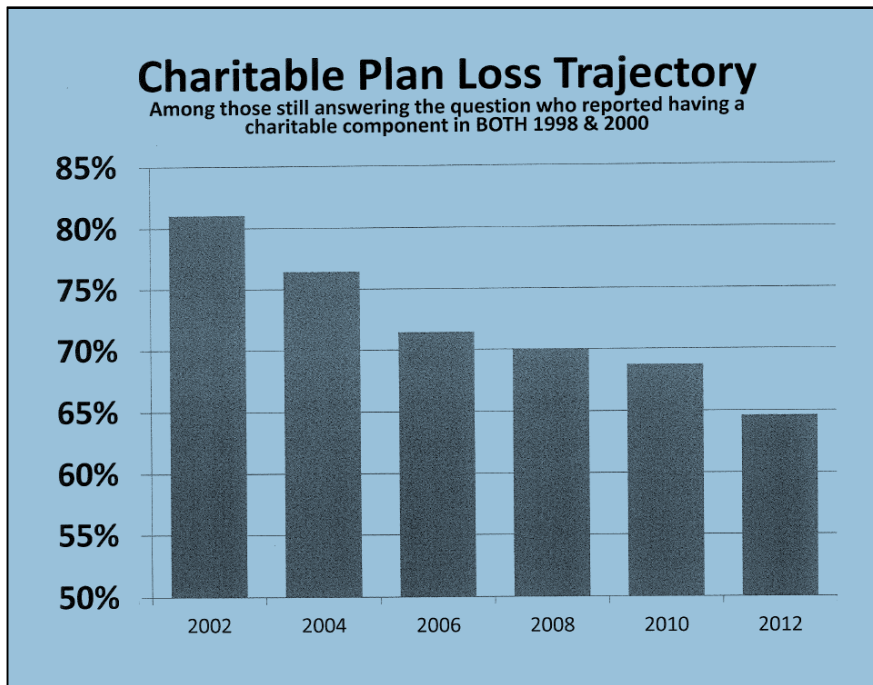
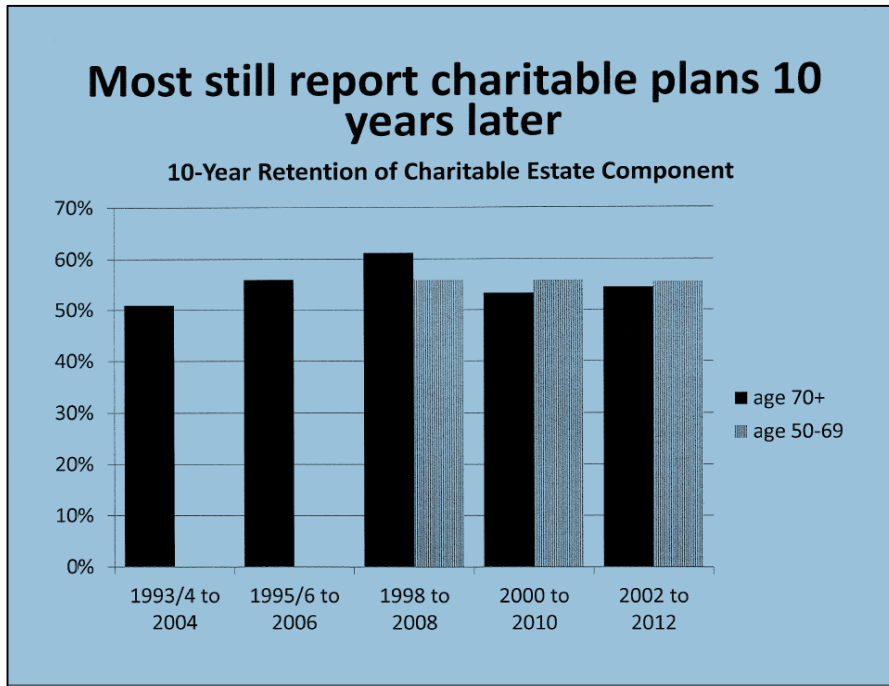
Recognition (legacy) societies, events, visits, phone calls, and the other various contacts with legacy donors provide information and interactions so you get to know your estate donors and possibly their families, friends and advisors. You will find all the ways that each donor is connected to the mission of your organization and be able to call out those connections and deepen them.

A planned gift to your organization is truly a reason to celebrate. It is a profound expression of confidence in your institution and should be a joyous act. Keep this message and feeling front and center in all that you do with your planned giving donors and you, your organization, and your donors will all be the better for it.

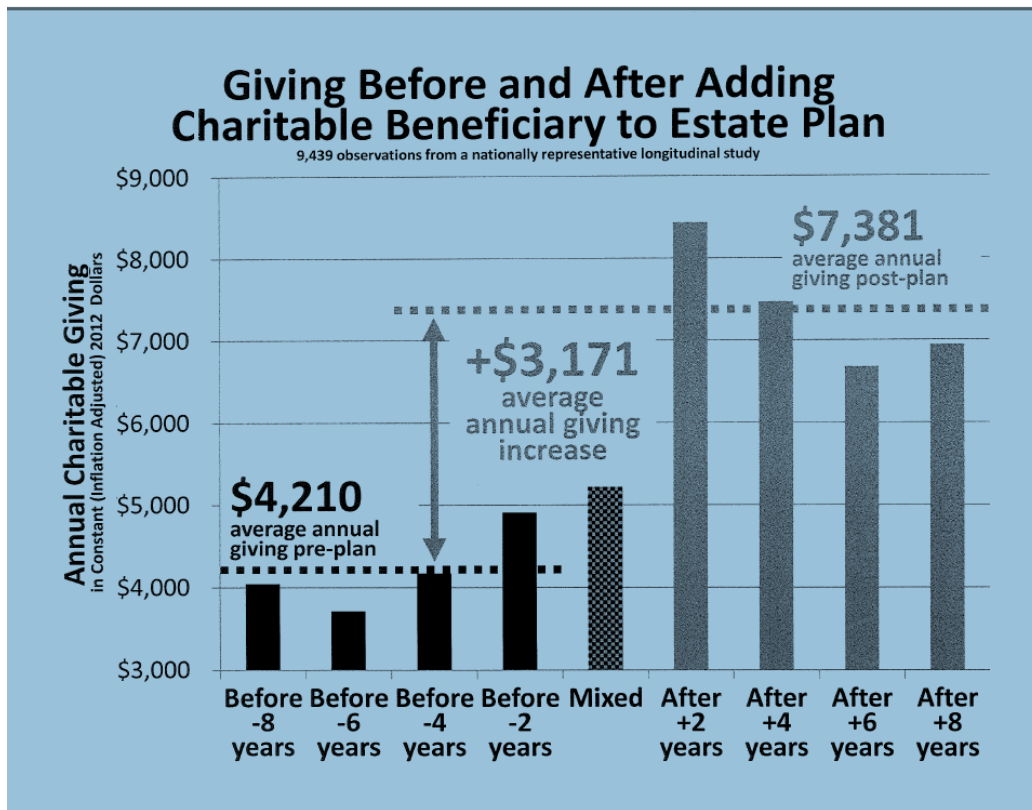
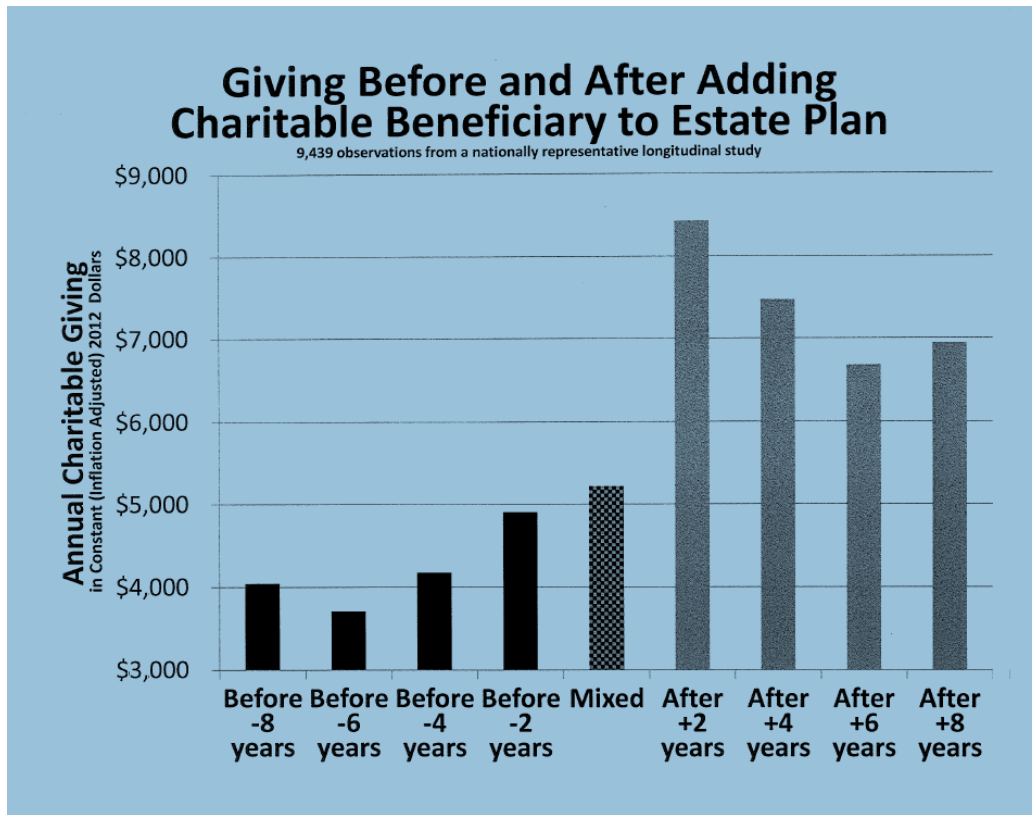
APPENDIX A

Research by Dr. Russell James, J.D., Ph.D., CFP  
Director of Graduate Studies in Charitable Planning at Texas Tech University

Bequest Retention Rates



Increase in Annual Giving



APPENDIX B

Legacy Society Welcome Letters and Gift Intention Forms



401 Mercer Street • Seattle, WA 98109 • 206.728.6463 TEL • 206.443.6691 FAX • KCTS9.org

KCTS 9 LEGACY CIRCLE INFORMATION FORM

I am pleased to accept membership in the Legacy Circle on the following basis:

- I have included KCTS 9 in my will or living trust.
I have named KCTS 9 as beneficiary of a life insurance policy.
I have named KCTS 9 as beneficiary of a retirement account.
I have arranged a trust, annuity or other planned gift for the benefit of KCTS 9.
I have made other arrangements to include KCTS 9 in my estate (please describe)

My name should appear in the Circle's records as follows (please include your spouse if you wish):

Name(s)

- I wish to remain anonymous.
I do not wish to be a member of the Legacy Circle.

Please verify we have your correct address and add your phone number and email address if you'd like to receive limited special invitations and announcements by email. We will never sell your name or address.

Address

Phone
E-mail

Signature Date

If you would like any additional information or if you have any questions, contact Sara Elward, Manager of Gift Planning at (206) 443-6730 or selward@KCTS9.org.

INFORM | INVOLVE | INSPIRE



## KCTS Legacy Circle Welcome Letter



401 Mercer Street • Seattle, WA 98109 • 206.728.6463 TEL • 206.443.6691 FAX • KCTS9.org

January 1, 2012

Sara Elward  
401 Mercer St  
Seattle, WA 98109

Dear Sara:

It is with great pleasure that I welcome you to the *KCTS 9 Legacy Circle*, which recognizes those individuals who have decided to include KCTS 9 in their estate plans. You join many others who have made a financial commitment to support our efforts by giving in this way and we are truly grateful. Your generosity will help KCTS 9 deliver quality programming that enriches and educates viewers for years to come.

Our Legacy Circle honors those who have chosen to support KCTS 9 through a bequest, a life insurance policy, an annuity, a trust or other gift, such as a retirement plan beneficiary designation. This allows us to thank you as one of our benefactors during your lifetime. There are no dues or other obligations, but as a member, you will be our guest at various events and receive special informational mailings. Also, if you are willing, your name will be listed with other Legacy Circle members in our Annual Report. And you will receive the monthly *Start at KCTS 9* viewer guide as well as a 20% discount at The Channel 9 Store.

Enclosed you will find a copy of our Legacy Circle information form. Please complete the form and return it in the enclosed envelope. If you are willing, we would also appreciate it if you would include a copy of that portion of your will or other gift documentation that pertains to KCTS 9. That would enable us to review the wording to make sure your gift can be used in accordance with your intentions. The information you provide will be held in strictest confidence.

Again, we thank you for your generous support of KCTS 9 and for your thoughtfulness in advising us of your intention. We look forward to showing our appreciation in more tangible ways through the Legacy Circle.

Sincerely yours,

Sara Elward  
Manager of Gift Planning

INFORM | INVOLVE | INSPIRE



[LOGO]

LEGACY SOCIETY  
GIFT NOTIFICATION FORM

*Type of Gift.* I am pleased to become a member of the ABC Charity Legacy Society by making the following type of legacy gift to ABC Charity:

- I have included ABC Charity in my will or living trust.
- I have named ABC Charity as beneficiary of a life insurance policy.
- I have named ABC Charity as beneficiary of a retirement or other financial account.
- I have arranged a trust, annuity or other planned gift for the benefit of ABC Charity. *[If you offer charitable gift annuities, list gift annuity as a separate item to choose.]*

*Purpose of Gift.* My gift is to be used for the following purpose:

- Unrestricted (use where needed most)     *[Program Area]*     *[Program Area]*
- I have attached a photo copy of the relevant portion of my will, trust or other planned giving document.

*Amount of Gift.* The approximate amount of my legacy gift will be \$ \_\_\_\_\_.

*Recognition of Gift.*

- I am happy to have my name listed as a member of the ABC Charity Legacy Society. My name should appear in ABC Charity publications as follows (please include your spouse if you would like):

Name(s) \_\_\_\_\_

- Thank you, but I/we wish to remain anonymous

Name \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_ Phone \_\_\_\_\_

So we can send wishes of the day, will you let us know your birthday? \_\_\_\_ / \_\_\_\_ / \_\_\_\_

E-mail address \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Please return to: [Contact Information]

University of Washington Legacy Society Welcome Letter



April 12, 2012

Ms. Sara Elward  
527 – 26<sup>th</sup> Avenue  
Seattle, WA 98122

Dear Sara:

Thank you for your future gift to KUOW. We truly appreciate your thoughtfulness and generosity. I am grateful for all that you are doing on behalf of public broadcasting!

As a result of your commitment, we are pleased to welcome you as a new member of the *Henry Suzzallo Society*, a university-wide recognition society established to honor and thank individuals like you who have made a future gift. The names of Henry Suzzallo Society members are published in our annual Report to Contributors, so unless I hear otherwise from you, we will include your name among our thoughtful supporters.

You may know that we have an annual appreciation event for Suzzallo Society donors. These events allow members to learn about an area of the University they may not be familiar with and to enjoy a lecture or performance by a faculty member. Our events usually are held in the summer, so please watch for your invitation later this year.

I have really enjoyed getting to know you through Friends of UW Libraries and WPGC. If you have any questions about the Suzzallo Society, please feel free to contact me at 206-685.3289 or at [amyscott@uw.edu](mailto:amyscott@uw.edu). Thank you again for your gift to KUOW.

With warm regards,

A handwritten signature in blue ink that reads 'Amy Scott'.

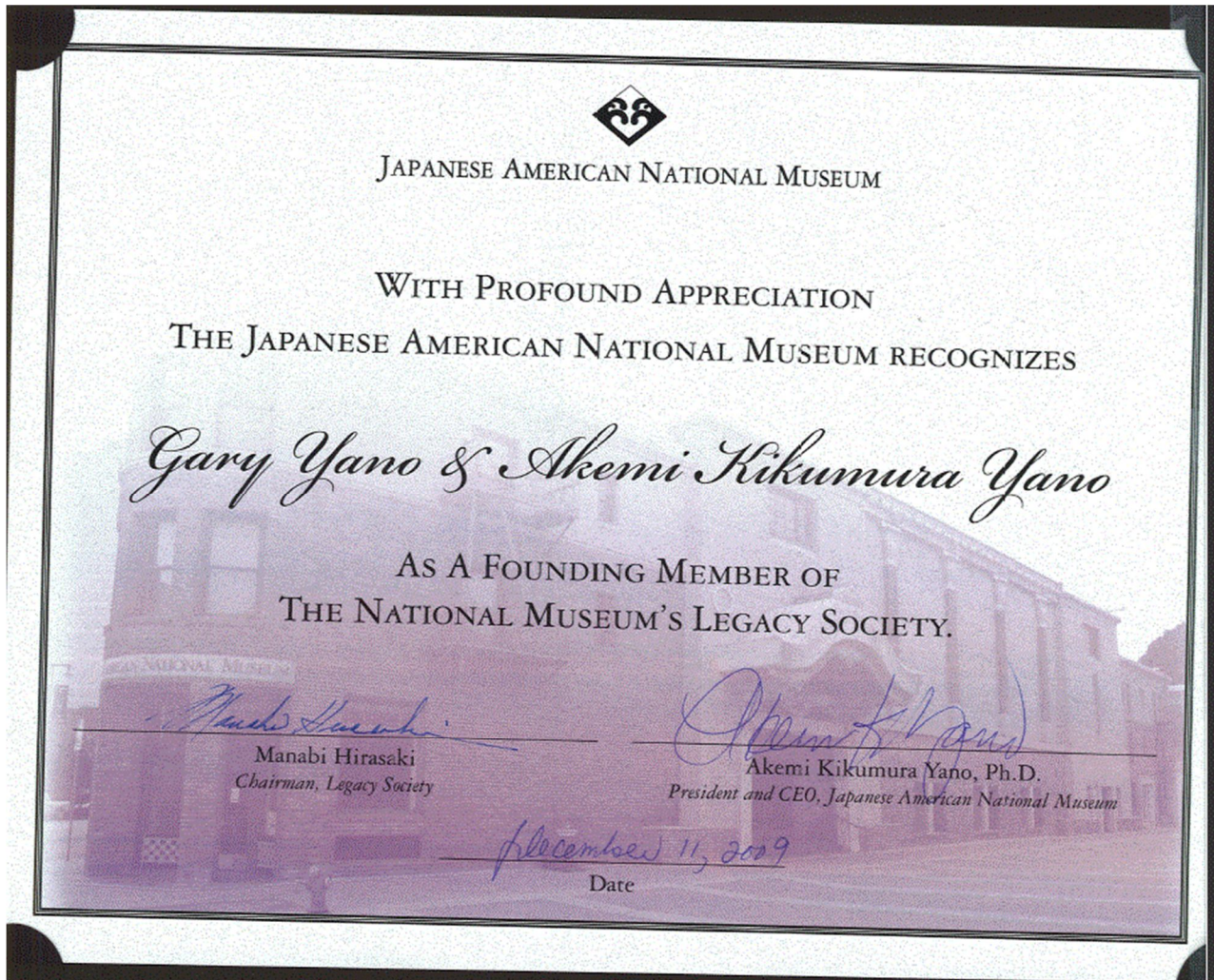
Amy Scott  
Associate Director, Planned Giving

Enclosures



APPENDIX C

Legacy Society Membership Certificates





*thank you...*

**In gratitude for your role  
in preserving the legacy  
of public television  
for future generations.**

KCTS TELEVISION WELCOMES

*Sara Elward*

INTO THE

KCTS 9 LEGACY CIRCLE

MAY 5, 2009

  
MAURICE BRESNAHAN  
PRESIDENT & CHIEF EXECUTIVE OFFICER



INFORM | INVOLVE | INSPIRE



The Make-A-Wish  
Alaska and Washington  
welcomes

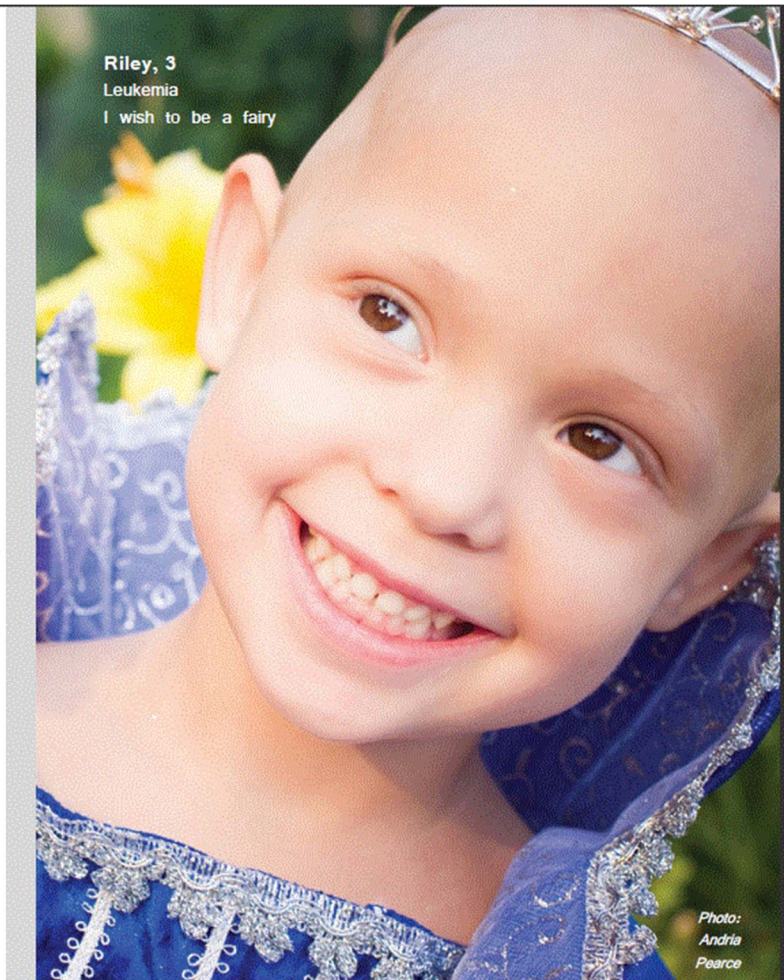
## JOHN SMITH

to the Legacy of Wishes<sup>SM</sup> Society.  
Thank you for making a special gift  
and becoming part of the  
Make-A-Wish<sup>®</sup> family.

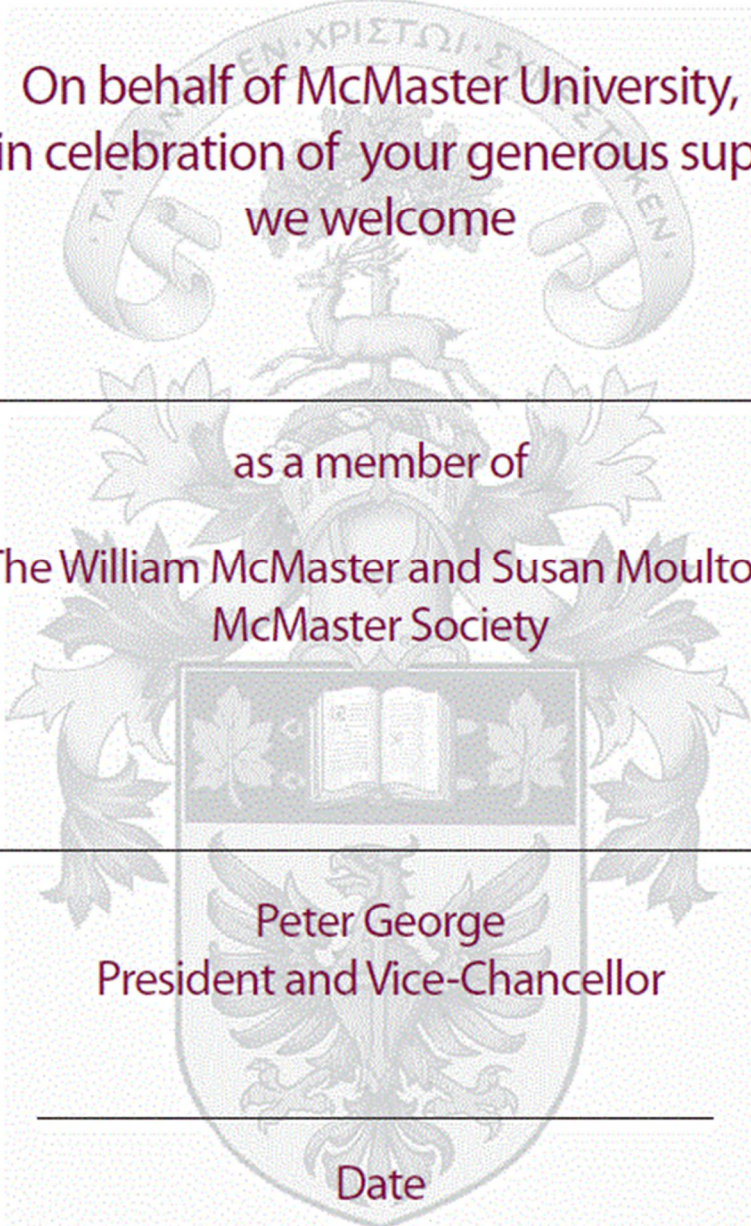
LEGACY of WISHES<sup>SM</sup>

---

Barry McConnell  
President and Chief Executive Officer  
Make-A-Wish Alaska and Washington







On behalf of McMaster University,  
and in celebration of your generous support,  
we welcome

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as a member of

The William McMaster and Susan Moulton  
McMaster Society

---

Peter George  
President and Vice-Chancellor

---

Date

## APPENDIX D

### Legacy Society [Annual] Event

If you have some time and resources, try to offer some type of event during the year that is for legacy society members only. Donors enjoy the chance to meet and mingle with like-minded people and it helps build a sense of a special community especially dedicated to the future of the non-profit. With this in mind, the primary goal of the event should be to recognize and thank your members and convey to them a feeling of special status. A secondary goal is to educate your donors about the activities of your organization and create a greater level of involvement.

This does not necessarily have to be a large annual event. The key is to make it be as big or as small as your non-profit can sustain, focusing on the quality of the experience. It might be something relatively simple such as coffee with the President or perhaps a tour of a new facility. If smaller groups are more manageable, offer small group meetings with the President (coffee, lunch) at different times during the year (the number will depend on the number of possible attendees). This gives flexibility to you as well as to your donors, who may not otherwise be available if a single date is chosen.

A few years ago, a YMCA sought to replace its annual Heritage Club Dinner with a “series of more varied, intimate and cost-effective events.” They gave members the opportunity to choose from a myriad of “Heritage Club donor appreciation events” instead of the single dinner, some of which were unique to the Heritage Club members and some of which were existing events:

- May 18 - Black Achievers Scholarship Awards Banquet
- Day trip to a summer camp (lunch and tour included)
- October 2 - Northshore YMCA 30th Anniversary Gala
- November 6 – Camp Values Award Celebration
- Fall - A.K. Guy Award Luncheon
- YMCA Vision 2020 conversations with the CEO (lunch or happy hour options)
- Legacy Giving seminar or individual consultation
- YMCA branch or program visit

While an annual event just for legacy society members is not a necessity, for most non-profits it is a good goal to aim for. Make the event important and have board members and the executive director attend. These leaders should convey the strength, momentum, and



future plans of your organization and recognize the impact deferred gifts of society members will have. Daytime events are usually preferable to nighttime; if the time is kept to 1½ hours, legacy society members who are working will be able to attend.

The best programs are those that are mission related versus estate or financial planning type themes. This is illustrated by a medical center that featured their head of Thoracic Oncology, who described to the audience what they were able to accomplish and gave them a feel for the patient interactions. Secondary were some low-key references to philanthropy and donors woven into these remarks.

Look to hold the event at the non-profit if space allows. If not, look for unusual venues that will help make the event more special and desirable. One non-profit in Hawaii was able to hold its inaugural event at the estate of model Kathy Ireland, not usually accessible to the public. The Seattle Symphony has partnered with cruise line Holland America (not Carnival!), with its annual luncheon held aboard one of the large cruise ships. In another instance, a local artist offered space in his glass studio for a gathering, including glass blowing demonstrations as part of the event.

You may want to consider having legacy society member(s) help plan the event and promote it. This can result in better ideas for the program and increased attendance. The event invitation could be from the donor volunteer, particularly helpful if it is a recognized name.

KCTS 9 features a different type of program each year as the theme of the legacy lunch. In 2011, Legacy Circle members were invited to a behind-the-scenes presentation from the director and producer of an upcoming documentary on the 50th anniversary of the Seattle World's Fair. The lunch was held in the Space Needle, an icon of World's Fair, and guests were invited to bring their World's Fair memorabilia and stories. At least 75% of the guests at the lunch had attended the Fair and had great stories to share along with a wide variety of souvenir items. A full-color replica of a placemat from the Fair was at each place (laminated in plastic as so many placemats were in 1962), dessert was a cupcake with a Space Needle golf tee as decoration, and the take-home gift was a KCTS 9 logo thumb drive. Attached to the thumb drive was a quarter that had been flattened and stamped with an image of the Space Needle (another very typical vacation souvenir from the Sixties.)

In 2012, KCTS focused the lunch on its live-broadcast cooking show, KCTS 9 Cooks, which has been airing for 15 years. The presenters included the producer, the executive producer, and frequent guest chefs Tom Douglas and Thierry Ratureau. All the attendees felt very special since Tom Douglas had just received the James Beard Award as 2012 Outstanding Restaurateur earlier in the week. He also shared that his staff was fixing lunch that same day for President Obama who was visiting Seattle while Tom chose to have lunch with them at

KCTS 9. Shortly after the lunch, Thierry Ratureau was selected as a contestant for the upcoming season of Top Chef Masters. The lunch was held in the KCTS 9 studio.

Prior to the lunch, the staff had solicited contributions of aprons from friends, family, co-workers, etc. On the back of each chair was a different apron carefully tied in place which soon became a conversation piece as donors traded aprons or selected their seats based on which apron they wanted. To bring color to a basic “black box” television studio and to give the guests the opportunity to do a bit of “cooking,” the centerpieces were unfrosted cupcakes on Fiestaware plates in a wide variety of colors. Around the plates were varied small pieces of Fiestaware with icing and colorful sprinkles, for each guest to create his or her own cupcake for dessert. The take-home gifts were recipe cards for favorite recipes selected by the executive producer and wrapped in a KCTS 9 Cooks kitchen towel.

The Pride Foundation is a community foundation which provides grants and scholarships related to the LGBTQ (Lesbian, Gay, Bisexual, Transgender, & Questioning) and straight ally community. For some years, the Legacy Circle event was an evening wine and heavy hors d’oeuvres party at a private home. After the normal welcome and organizational update, the guests were divided into groups. Each group was given the same three grant applications, all of which had NOT been funded in the prior grant making cycle. The Foundation set aside \$1,000 to be awarded that night. Each group made a top choice and then all the groups came together, discussed their process, and finally voted collectively to determine the grant recipient. This activity provided legacy donors a chance to see how their gifts might be used in the future and gave them an understanding of how difficult grant making decisions are. (A side benefit was that it underscored how there is never enough funding available for all of the deserving projects!) Sharing the thank you letter from the organization which received the grant with the attendees was a great follow-up to the event.

Whatever type of event you do, whether large or small, the key is to focus on the quality of the event. Take time to pay attention to the details, have staffing sufficient to ensure things run smoothly, and choose presenters carefully. Try to think of the small things that can make such a difference. One example of a thoughtful approach is from Dyan Sublett, President of the Martin Luther King Community Health Foundation. At one of her prior organizations, new members were presented with legacy society pins at the annual luncheon, usually from the development officer. One year the organization went a step further and arranged for individuals who were important in a particular donor’s connection to the non-profit to do the pinning. For one donor it was a Board member they were particularly close to. For another it was the head of the program area they were supporting. For each new member it was a unique person placing their pin and thanking them. It was quite moving and a particularly meaningful experience for the donors. As a part of its legacy society annual gathering, Morris Hospital Foundation gives each member a chance to share why the hospital is special to them and/or why they made a planned gift

APPENDIX E

Legacy Society Membership Benefits

Many organizations offer some variety of the following benefits:

- Name listed in annual report and other publications, on donor walls and website
- Invitation to an annual legacy event, usually lunch or dinner, with CEO/President/other leadership of the organization
- Invitations to other events-annual gala, major donor stewardship events, receptions, briefings from leadership or key staff, etc.
- Legacy society certificate
- Legacy society lapel pin
- Legacy society membership card
- Featured story in a newsletter, on website or other planned giving materials
- Discounted parking
- Cards for birthdays or various holidays
- Behind the scenes tours
- Boxed greeting cards with designs pertinent to the organization

Benefits specific to various organizations:

Organization	Benefits
Children’s Hospital Seattle	Share your life story through our <i>Lives of Meaning, Legacies of Healing</i> computerized touch screen display. This display preserves the images and biographies of past and current legacy donors for posterity.
KPLU	A CD we produce every year and seats at one live studio session.
Make-A-Wish Foundation	A copy of our founding wish story. Limited edition Wish Kid’s book with wish quotes and photos (Snapfish books. We have a special discounted deal with them. These are great.)Wish impact statement from families and volunteers
Oregon Public Broadcasting (OPB)	OPB’s Lending Library of CDs and DVDs
PATH	Lectures featuring global health experts from around the world. Global health seminars that provide an insider’s view from our staff.
Seattle Humane Society	Seattle Humane Society Pet Guardian Program The Seattle Humane Society (SHS) Pet Guardian Program (PGP) is a service for SHS supporters who specify in their will or trust document that their companion animal(s) is/are to be entrusted to the Seattle Humane Society at the time of their death. For a one-time fee of \$1,000.00 (fee may be paid in installments), an individual or family can enroll as members in the Pet Guardian Program. This membership covers up to five cats, dogs and small critters. This membership remains in effect during the lifetime of the enrollee and includes any animals they own at the time of their death.
South Seattle Community College	Invitation to judge student project presentations at our alternative high school/college at the end of the school year. Invitations to special wine-release parties from the College’s Wine Academy or special gourmet lunch and high tea days from our culinary program.
University of Washington	Access to the Library and to the Waterfront Activity Center.

APPENDIX F

Thank You Notes

played on the lawn.  
Though we were homeless, the library helped me, mother my son by allowing me to give when I had nothing to spend.<sup>31</sup>  
Your gifts and your work with the friends help put dinosaur books and biographies on the shelves, provide programs like story times and much more, and all this happens in places that welcome everyone in our community. Thank you!

Fondly,  
Ma

January 17, 2008

Dear Debra and Jeffrey,  
I want to share a library story with you. We received a letter from a library patron who wanted us to know how the library helped when she and her young child were homeless. She wrote:  
"We arrived each day as the doors opened. My eager boy discovered dinosaurs, befriended librarians and developed an ongoing love of books. I devoured biographies, building myself up with stories of others who faced challenges. We shared story time and

Dear KCTS,

I have to contribute money to an organization 2 times a year of my contract to my allowance. I chose you because you have commercial-free kid shows. That's why I chose you and gave 15 dollars.

Sincerely  
Bryce

P.S. Some of my favorite are on there.

P.P.S. My little brother is donating \$10 too!

+ 0.00 PDS  
from: R. G. W.

7-12-6

I like PBS Kids and NOVA

I'm watching NOVA  
right now!  
here's some

money

All from me

SENT 125.00 CASH



Camp Ten Trees  
1122 East Pike Street | PMB #1488 | Seattle, Washington | 98122 | (206) 288-9568  
info@camptentrees.org | www.camptentrees.org



Camp Ten Trees creates a loving & engaging youth camp environment for LGBTQ communities & their allies.

November 12, 2007

Dear Sara,

Julia came back from Camp Ten Trees this summer inspired, excited and committed to helping Camp fund raise and grow - but she had not a clue as to how that could happen or what to do. She and I had a brainstorming meeting on the purple couch (the best place for such thinking) I suggested that 3 books on fundraising, make a list of people who can mentor you and learn who all the people are in the organization and what they do. From that little meeting eventually came your help. You can be assured that 99% of what you said at the Saturday meeting was new to all of us - was crucial information - and will allow the fundraising committee to move forward with a sensible plan and succeed. You gave us your time + experience + we thank you!! The way you spoke and the stories you told were a model for us.

love and appreciation from us all  
↓

Handwritten signatures on colorful sticky notes: Kristin M. Montague, Julia Crowl, Andrew!, Kelly, Russel, Heather, Randy Joseph



It's not just a camp. It's a revolution.

Elward, Sara

---

**From:** Jacquie Resch [JacquieResch@shaw.ca]  
**Sent:** Friday, December 05, 2008 2:31 PM  
**To:** Elward, Sara  
**Subject:** Hilary Bridge

I do thank you for your lovely letter. If only all charities were as grateful for such a gift. Hilary was a person who absolutely loved to listen to the radio and I do believe that your station was the one she liked best. She loved to give to charities that meant something to her and she was quite specific about your station in that regard. Perhaps, you may have done some advertising for her in the past, or had something to do with telethon, or something else. I wish I could go back and get a statement from her as to her whys but I think perhaps you might have to just give your station and workers a great pat on the back for making her happy.

She was a welcome addition to our small family for 10 years and having lost my dad only 6 months prior, it has been quite a loss. However, they were both happy to go if and when it was their time. I loved her like a mother as my mother passed over 30 years ago and Hilary was a caring and loving friend and considered me her daughter. She lost her daughter many years prior so she welcomed our little family troupe into her heart as well.

My dad Jack Bridge was an amazing man as well; I could go on about him forever. He and Hilary met, fell in love, each having lost a soul mate of over 50 years and each having lost a child; my brother at 21 and Hilary's daughter at 35. It was a second chance at happiness for both of them and it was a wonderful 10 years. They were always laughing and enjoyed life to the max with lots of travel, etc. they eloped to the Chapel of Flowers in Las Vegas; we all spent a lot of time together having fun and laughing. I miss them both terribly but I have no regrets as I loved both of them enough to be there for them completely at the end of their times.

Bless you for wanting to pass this on Sara. Thankyou, Sincerely, Jacquie Resch  
Loving stepdaughter to Hilary Bridge

## APPENDIX G

### Sample Quarterly Letter to Legacy Society Members

(a slightly modified version mailed to qualified legacy society prospects as well)

Date

Name

Address

City, State Zip

Dear \_\_\_\_\_,

This past weekend in San Francisco, the **Online News Association announced its annual awards**, and I am very proud to tell you that **EarthFix**, a public media project of KCTS 9, Oregon Public Broadcasting and Boise State Public Radio, Idaho Public Television, KUOW, Northwest Public Radio and Television, Southern Oregon Public Television and the Corporation for Public Broadcasting, received two awards. The first was in the category of explanatory for the **Elwha Dam coverage** produced by Ashley Ahearn at KUOW and Katie Campbell at KCTS 9, and the second was in the category of topical coverage and went to the entire EarthFix team for their **environmental coverage**. We are all very proud of this project and our participation in it. If you are not familiar with EarthFix, please check it out at <http://earthfix.kcts9.org/>.

However, KCTS 9 is not resting on its laurels. KCTS 9 has begun developing **Jazzed**, a documentary that follows promising students and dedicated teachers who hope to participate in *Essentially Ellington*, the most innovative jazz education program in the country. If we secure the funding for this project, the film will find out why Seattle area high schools have dominated the national competition since 1999. Students, teachers and family members speak candidly about the passions, challenges and sacrifices involved in their journeys of personal achievement.

*Jazzed* will extend beyond the documentary by drawing on the resources of Nine Media Lab, KCTS 9's digital storytelling program. Students, educators and parents will learn to shoot and edit their own digital stories as part of the *Jazzed* project. There will also be an online tool for music lovers, exploring the elements of a jazz ensemble and a jazz toolkit for teachers.

But wait, there is more!! I also want to be sure that you know about **Women and Girls Lead**, a multiyear public media initiative to focus, educate, and connect citizens worldwide in support of the issues facing women and girls. Two upcoming programs which you don't want to miss are part of this initiative. The first is **Half the Sky** premiering on October 1<sup>st</sup> and 2<sup>nd</sup>. It follows authors Nicholas Kristof and Sheryl WuDunn and celebrity activists America Ferrera, Diane Lane, Eva Mendes, Meg Ryan, Gabrielle Union, and Olivia Wilde on a journey to tell the stories of inspiring, courageous individuals in 10 countries throughout the world.

The second program is ***MAKERS: Women Who Make America*** a comprehensive and innovative three-hour documentary for PBS, to air in early 2013. The film will feature the stories of those who led the fight, those who opposed it, and the unintentional trailblazers -- famous and unknown -- who carried change to every corner of society. ***MAKERS*** will recount the seminal events of the organized women's movement from the publication of *The Feminine Mystique* in 1963 to the Anita Hill vs. Clarence Thomas hearings in 1991. But it will also go much further, telling the surprising and unknown stories of women who broke down barriers in their own chosen fields, from the coal mines of West Virginia to the boardrooms of Madison Avenue. And it will take the story to today, when a new generation is both defending and confronting the reality of their mother's legacy. You don't have to wait until 2013 to see and hear some of these amazing stories. The website [MAKERS.com](http://www.makers.com) contains dozens of video portraits of women who have led the way. I might suggest that you start with the story of Kathrine Switzer at <http://www.makers.com/kathrine-switzer>.

Are you at least slightly dazzled? I know that I am. And I am also so pleased to know that my annual gifts and my eventual estate gift to KCTS 9 are making these exciting, inspiring, important programs possible. Thank you for joining me in preserving this caliber of public television for future generations.

All my best,

Sara Elward  
Manager of Gift Planning

## Stewardship of Planned Giving Donors

---

Date

Name

Address

City, State Zip

Dear \_\_\_\_\_,

In case you aren't aware of it, **you** are the best part of my work at KCTS 9. Lately, I've been visiting supporters like you who have included KCTS 9 in their estate plans, and the conversations have been so rich and delightful that I'm just brimming over with excitement about KCTS 9, the role that public television plays in the lives of so many people, and the commitment that all of you have to the future of public broadcasting.

My recent visits have taken me to Ellensburg, the Tri-Cities, Sequim, and Vashon, but everywhere I hear some of the same comments:

"KCTS is the **only** station I watch."

"I can't travel, but KCTS 9 brings the world to me."

"My kids all grew up on *Sesame Street* and *Mr. Rogers' Neighborhood*."

"This is the only place I can go for in-depth coverage of the issues."

"We **love** *Doc Martin*!"

"I want to be sure that KCTS 9 is there for the future."

As a KCTS 9 supporter, I wish you could hear all the wonderful stories and impassioned statements about KCTS 9 that others share with me and the thoughtful criticisms and requests from people who care deeply about public television.

Fortunately, our supporters also send us notes, and I've collected quite a few of these. Some of these notes are enclosed on a separate page and include a picture of one of our feline viewers. I share these with you in the hope that they will give you a real feel for what I hear on my visits.

If you have any KCTS 9 stories or memories to share, if you would like a tour of the station or if you have questions or suggestions, please feel free to contact me at [selward@KCTS9.org](mailto:selward@KCTS9.org) or 206.443.6730. I'm always happy to hear from another public television enthusiast. As I said, **you** are the best part of my work at KCTS 9.

All my best,

Sara Elward  
Manager of Gift Planning

P.S. I've seen some previews of a new PBS series, **CIRCUS**, which will begin November 3<sup>rd</sup> and I suggest you mark your calendar. The filmmakers follow The Big Apple Circus for an entire season and capture the training and rehearsals, the behind-the-scenes and the under-the-big-top, the bravery and intensity of life and work in the circus. I can't wait to see the whole series.



APPENDIX H

Vision for the Future  
**Heritage Society Member**

**Alison Smith**

The Board of Trustees and staff of Puget Sound Blood Center thank you for your foresight and commitment to our mission – *saving lives, through research, innovation, education and excellence in blood, medical and laboratory services, in partnership with our community.*

*Thank you for remembering the Blood Center through your planned giving.*

---

Nancy Sclater, Chair  
Board of Trustees

---

James P. AuBuchon, MD, FCAP, FRCP (Edin)  
President and CEO

---

Michael Cheever  
Director of Development

---

Jeanne Galloway, ND  
Planned Giving Officer



research | medicine | blood & tissue services



Puget Sound Blood Center

APPENDIX I



Special Edition

Inside This Issue

- Remembering Mom
- What is the Heritage Society?



La Conner resident, Rae Allen with her mother, Lorena.

Daughter Donates to Platelet Research

Heritage Society member Arleta "Rae" Allen of La Conner recently made a generous gift to a program at PSBC that is close to her heart: platelet research. Rae's mother, Lorena Honeycutt, passed away only six months after a diagnosis of Myelodysplastic Syndrome, a blood disorder known as "pre-leukemia" for which platelet transfusions are important treatments. Unfortunately, Lorena's body began rejecting the platelet therapy.

In Rae's words: "My mother was a vital woman she hunted, fished, crabbed, and clammed along the ocean shore...I wish you could have seen her face when she caught a fish. She would grin like a five-year-old. She went from this energized, active woman to a person whose spirit wasn't crushed, but whose body was just a shell. It was hard to see over such a short period of time."

Rae was inspired to give when she discovered that the PSBC Research Institute is currently investigating the very condition that caused her mother's premature death - platelet rejection. Rae has pledged to match dollar for dollar all gifts to platelet research made through the end of the year.

"I am glad to be a part of the Heritage Society and to give gifts now, too."


To see Rae talk about her mother and why she supports PSBC, or to join her in funding platelet research, visit [psbc.geocko.com/campaigns](http://psbc.geocko.com/campaigns).

**Did you know?**

Your IRAs, 401(k)s, annuities, and life insurance policies are distributed according to the beneficiary you select, not based on your will. If you have an account like these, call your account manager and verify that you have accurate beneficiaries listed. Otherwise, IRA funds roll into your probated estate and heirs can be hit with a larger tax burden.

**At your service!**

End of life concerns about finances are difficult to talk about. Puget Sound Blood Center has a network of professionals to evaluate your estate needs and give you unbiased advice. Contact Jeanne Galloway, ND At (206) 398-5967 to discuss some options.



### What is the *Heritage Society*?

A number of years ago, several longtime blood donors and financial supporters of Puget Sound Blood Center came together with a shared desire to build a bridge to the future. They were grateful to live in a community with such wonderful health and wellness services.

They wanted to lay a foundation so that their children, grandchildren and great-grandchildren would have the same access to a safe and effective blood supply as they have had for nearly 70 years through the mission of Puget Sound Blood Center.

This group formed the *Heritage Society* — a recognition society for those who have placed the Blood Center in their will, created a charitable trust, or a charitable gift annuity.

You can save a life...not just today, but also in the future through your estate planning.

Send in the bottom of this sheet via mail, or call *Jeanne Galloway, ND* at 206-398-5967 to talk about saving lives in the future.



*Joining the Heritage Society means saving lives far into the future!*

**CONTACT US:**

Jeanne Galloway  
Heritage Society Manager  
Phone: 1-206-398-5967  
Email: [JeanneG@PSBC.org](mailto:JeanneG@PSBC.org)  
Web: [psbc.org/gifts/special.htm](http://psbc.org/gifts/special.htm)



**Puget Sound Blood Center**  
blood services | medicine | research



Join the *Heritage Society*  
**Blood Saves Lives!**

*Mail this to:*  
PSBC Development  
921 Terry Avenue  
Seattle, WA 98029

**Yes! I support Puget Sound Blood Center's work to save lives.**

- Please note I have named Puget Sound Blood Center in my will.
- Please send me information on how to include Puget Sound Blood Center in my will.
- Please send me information on how to make a gift to Puget Sound Blood Center that pays income for life to me and/or other persons.
- Please contact me, I'd like to discuss estate planning questions.

**Please send acknowledgement or information to:**

Home  Business

Name (s): \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_