



# Planned Giving Marketing for Starting/Restarting A Program



Date: June 29, 2017  
Time: 1:00 – 2:30 Eastern Time  
Presenter: Andrew Palmer  
Director of Marketing Services  
PG Calc

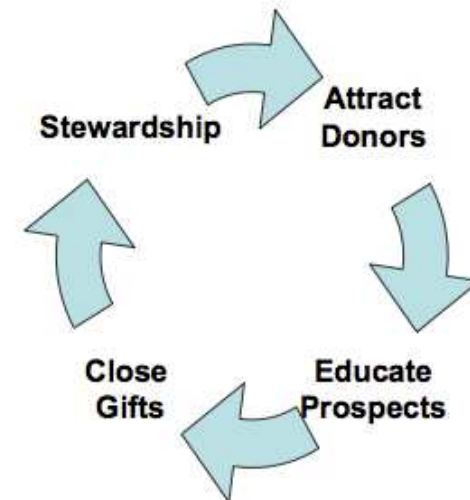




# Agenda

## Planned Giving Marketing

- Are we ready or should we wait?
- But where do you start?
- Planning and tactics
- How do I do it all?





# Start a New Program

This requires no technical expertise on your part.

Encourage donors to remember your charity in their plans...

And perhaps answer questions about how a potential bequest might be used.





# Just Do It

Ready

**FIRE!**

Aim





# No One Likes to Talk About Death

**Let's talk about your legacy...**

Ask: What do you want to be known for?





# You Know More Than You Think

- Everyone knows about wills
- Bequests are two-thirds of the deferred gifts





# Keep It Simple

- Bequests
- Beneficiary Designations
  - Life insurance
  - Retirement plan
  - Bank accounts
- Appreciated Stock
- Charitable IRA Rollover





# Not an Expert? Get a Back-up Plan

- Internal – knowledgeable staff person
- External – knowledgeable colleague(s)
- Board member or other volunteer
- Consultant, e.g., PG Calc
- Legal counsel







# Start With Existing Assets

## Efforts already in place

- Inserts in thank you letters
- Checkboxes on reply envelopes
- Annual report
- Newsletter
- Facebook page
- Internal telephone callers
- The Board





# Add This Everywhere

**“Please consider leaving a gift to Charity  
in your will or trust. Our Tax ID is: xx-xxxxxxx.”**



Your website, direct mail reply forms, newsletters



# Acknowledge With Some Marketing



Thank you once again! We are so appreciative for your support and are proud you have chosen to partner with Marietta College to help provide an outstanding education for today's students.

As our partner, we want to share other ways you can support Marietta College that will help meet our student's needs far into the future and won't affect your finances today.

With **gifts made through your will, retirement accounts, or even a life insurance policy**, you can continue to provide for yourself and your family while also supporting Marietta College. You keep control should you need the resources during your lifetime and the gift passes to the College upon your passing.

Deferred gifts can be easy to arrange and we would be happy to talk with you in greater detail. For more information, assistance or sample bequest language contact us.

215 Fifth Street, Marietta, OH 45750  
 Phone: (740) 376-4446  
 Email: [jarrett.stull@marietta.edu](mailto:jarrett.stull@marietta.edu)  
<http://giftplanning.marietta.edu>

**Thank You**

Your support makes a difference in ending homelessness.

*Planting Flowers of Hope: A Pine Street Inn tenant plants a garden.*

We are grateful for your support that provides outreach to men and women on the streets; shelter for those in need of a bed and a meal; and permanent housing for those building toward a better life.

We could not do this work without you.

Did you know you can extend your impact at Pine Street without affecting your current finances?

You can fulfill both your charitable and financial goals with a gift through your **will, retirement account, or life insurance policy**.

Using one of these strategies, you could make a gift that you never imagined was possible and help us end homelessness.

*Volunteers help prepare healthy meals for guests.*

**For more information, contact:**  
 Kristina M. Lentz  
 Director of Capital and Leadership Giving  
 444 Harrison Avenue, Boston, MA 02118

617.892.9182  
[kristina.lentz@pinestreetinn.org](mailto:kristina.lentz@pinestreetinn.org)  
[plannedgiving.pinestreetinn.org](http://plannedgiving.pinestreetinn.org)



# Ads

## A GIFT THAT PAYS IT FORWARD AND PAYS YOU BACK



If you're looking for ways to support the Worcester Art Museum and receive a steady income stream, a **charitable gift annuity** may be your answer.

It is a simple contract between you and the Worcester Art Museum. In exchange for a gift of \$10,000 or more, the Museum will provide guaranteed fixed payments to you for life.

**Other benefits include the following:**

- You support the Worcester Art Museum with a substantial gift
- Payments you receive are partially tax free for a period of time
- You receive a charitable deduction in the year of your gift

**How much income will I receive with a gift of \$10,000?**

Age	Annuity Rate	Annual Income	Charitable Deduction
60	4.4%	\$440	\$2,410
65	4.7%	\$470	\$3,096
70	5.1%	\$510	\$3,798
75	5.8%	\$580	\$4,348

\*Please note that this information is for illustrative purposes and is not intended as tax or legal advice. Rates are subject to change and are based on rates suggested by the American Council on Gift Annuities.

## WORCESTER ART MUSEUM

For more information please call the Development Office at 508-793-4325 or email us at [plannedgiving@worcesterart.org](mailto:plannedgiving@worcesterart.org)

## What *legacy* will you leave?



As you look back fondly on your St. Sebastian's days—on your teachers, coaches and classmates—think about how you can help ensure future St. Sebastian's students have an education that is just as exceptional and life-changing as yours.

*If education changes lives then charitable gifts to education help make that change possible.*

Learn how a charitable gift to St. Sebastian's, like a bequest in your will or living trust, can match your goals, values, and what you hope your lasting legacy will be.

For more information about gift planning and including St. Sebastian's in your estate plans, contact Ed Davis '65 in the Office of Planned Giving at 781.247.0158 or [ed\\_davis@stsebs.org](mailto:ed_davis@stsebs.org) or visit [plannedgiving.stsebs.org](http://plannedgiving.stsebs.org).

ST. SEBASTIAN'S SCHOOL  
*Rev. Charles D. McInnis Society*



# Online Presence

- Show that you exist
- Prove your expertise





# Discuss Each Gift and Asset

**American Red Cross**

WHAT WE DO | RED CROSS STORIES | NEWS & EVENTS | FIND YOUR LOCAL RED CROSS | SHOP THE RED CROSS STORE

DONATE FUNDS | DONATE BLOOD | TRAINING & CERTIFICATION | WAYS TO HELP | GET ASSISTANCE | Search

**Gift Planning**

- Why Give?
- Make A Plan
- How You Can Give
  - Find the Right Gift
  - Giving Through Your Estate
  - Giving and Generating Income
    - Charitable Gift Annuity**
    - Deferred Charitable Gift Annuity
    - Charitable Remainder Annuity Trust
    - Charitable Remainder Unitrust
    - Charitable Flip Unitrust
  - Giving and Tax Benefits
  - Compare Gifts
- What You Can Give
- For Advisors
- Meet Our Team

**Charitable Gift Annuity**

Home » How You Can Give » Giving and Generating Income

A charitable gift annuity provides fixed payments to you for life in exchange for your gift of cash or securities to the American Red Cross. Gift annuities are easy to set up and the payments you receive are backed by the general resources of the American Red Cross for as long as you live.

**A charitable gift annuity could be right for you if:**

- You want to maintain or increase your income.
- You want the security of fixed, dependable payments for life.
- You want to save income taxes or capital gains taxes.
- You would like income that may be partially tax-free.
- You are considering a gift amount of \$5,000 or more.
- You are at least 65 years of age.

**Gift Calculator**

Donor(s) → Give assets → Gift annuity → Income tax deduction / Fixed payments → Remainder to American Red Cross

**How it Works**

- You make an irrevocable gift of cash, securities, or other property to American Red Cross.
- In exchange, American Red Cross pays you a fixed amount each year for the rest of your life.
- When your gift annuity ends, its remaining principal passes to American Red Cross.

**Talk to Us:**

Contact Our Staff | Call 1-800-797-8022 ext 5

**Sample Annuity Rates**

Gift Amount	Age	Payment Rate	Annuity	Deduction
\$10,000	65	4.7%	\$470	\$3,613
\$10,000	72	5.4%	\$540	\$4,326
\$10,000	79	6.6%	\$660	\$4,971
\$10,000	86	8%	\$800	\$5,836

**Tax benefits**

You will earn an income tax charitable deduction in the year of your gift. If you cannot use the entire deduction that year, you may carry forward all unused deduction for up to five additional years.

If you give appreciated property such as stock to create a gift annuity, you will avoid tax on some of your capital gain in the property. Even better, if you are the payment recipient of your gift annuity, you will be able to pay the tax on the rest of your capital gain in installments over many years.

By removing the gift assets from your estate, you may also reduce future estate taxes and probate costs.

**Assets to consider**

Cash currently held in a savings account, bank CD, or money-market fund makes an excellent funding asset. Usually, a gift annuity will provide you with larger payments than any of these investments.

Securities, especially highly-appreciated securities that you have owned for one year or more, are also an excellent funding asset. Giving them to us in exchange for a gift annuity will allow you to unlock their value to increase your cash flow and avoid substantial capital gains tax at the same time.

**Example**

Helen is a 71 year-old widow. She would like to make a significant gift to the American Red Cross, but she is dependent on the income produced by her investments. One of these investments is stock in XYZ Widget Corporation that she and her late husband purchased many years ago for \$3,000.

Her stock is now worth \$10,000 but provides little income - about \$121 after tax. Helen is reluctant to sell her XYZ Widget stock to reinvest in higher yielding assets because she will have to pay \$1,400 in capital gains tax in the process. This will leave her with just \$8,600 to reinvest.

Helen is pleased to learn that she can make a significant gift to the American Red Cross and increase her cash flow by giving her XYZ Widget stock to the Red Cross in exchange for a gift annuity. She can also save substantial income and capital gains taxes at the same time.

	Tax result	Cash flow before tax	Cash flow after tax (39.6% tax rate)
Helen keeps her stock	None	\$200	\$121
Helen sells and reinvests for 4.0% yield	Owes \$1,400 capital gains tax	\$344	\$208
Helen funds a 5.3% gift annuity	\$4,200* income tax deduction Avoid tax on \$2,940* of capital gain	\$530	\$417



# Engage Donors

**Gift Calculator**

Donor(s)

Give assets

4.7% Gift Annuity

Income tax deduction  
Fixed payments

Remainder to Holy Cross

[Personalize This Diagram »](#)

**How it Works**

1. You make an irrevocable gift of cash, securities, or other property to Holy Cross.
2. In exchange, Holy Cross pays you a fixed amount each year for the rest of your life.
3. When your gift annuity ends, its remaining principal passes to Holy Cross.

**Talk to Us:**

[Email](#) [Call us 508-793-3481](#)

**Gift Calculator**

Donor, 65 years old

\$25,000 Cash

4.7% Gift Annuity

\$9,033 Income tax deduction  
\$1,175 Annual payments  
\$803 Tax-free portion  
Payments made for life

Remainder to Holy Cross

[Personalize This Diagram »](#)

After 19.9 years, the entire annuity becomes ordinary income.

Gift Date is 3/15/2017.

Payout schedule is quarterly at end.

IRS Discount Rate is 2.6%.


These calculations are estimates of gift benefits; your actual benefits may vary.

**Talk to Us:**

[Email](#) [Call us 508-793-3481](#)



# Updating Older Websites




**LANCASTER BIBLE COLLEGE**  
YOUR JOURNEY. OUR FOCUS.

Home > Giving > Planned Giving

**PLANNED GIVING**

- Why Give?
- Create Your Legacy
- How You Can Give
- What You Can Give
- For Advisors
- Contact Us

**WHAT WILL YOUR LEGACY BE?**



Your planned gifts can have an enormous impact on Lancaster Bible College and our students – an impact that lasts for generations.


Your generosity makes LBC's Vision of developing the head, heart and hands of servant leaders for global impact possible today and tomorrow. A planned gift can benefit both your family and LBC. With your planned gift, you can donate through your estate by making the college a beneficiary to your life insurance or in your will. You can support both your family and LBC through a trust. Planned gifts can also work for you with tax savings and investment income for you and your family.

Planned gifts aren't only for the wealthy. No matter your level of wealth, you can create a lasting legacy.


**TALK TO US**

Our Advancement Department >  
Call 717-560-8211

**GETTING STARTED**



**MAKE A BEQUEST**



**LANCASTER BIBLE COLLEGE**  
YOUR JOURNEY. OUR FOCUS.

Login to myLBC | Calendar | Contact | LBC.edu  
Follow Us: [Social Media Icons]

Stay Engaged | Be Informed | Events | Campus Expansion | Give

**Give**

- Give Now
- Planned Giving
- Why Give?
- Create Your Legacy
- How You Can Give
- What You Can Give
- For Advisors
- Contact Us

**What Will Your Legacy Be?**

Your planned gifts can have an enormous impact on Lancaster Bible College and our students – an impact that lasts for generations.

Your generosity makes LBC's Vision of developing the head, heart and hands of servant leaders for global impact possible today and tomorrow. A planned gift can benefit both your family and LBC. With your planned gift, you can donate through your estate by making the college a beneficiary to your life insurance or in your will. You can support both your family and LBC through a trust. Planned gifts can also work for you with tax savings and investment income for you and your family.

**Talk to Us**

Our Advancement Department >  
Call 717-560-8211

**Learn more about:**

- Getting Started
- Make a Bequest
- 1933 Society
- What You Can Give
- Life Income Gifts
- The Ideal Gift for You?

Our Advancement Office > Call 717-560-8211





# Trust and Credibility

**ST LAWRENCE UNIVERSITY**

ACADEMICS ADMISSIONS ATHLETICS NEWS & EVENTS STUDENT LIFE

## Giving to St. Lawrence

CONTACT | DIRECTORY

Planned Gifts

- Why Give?
- Create Your Legacy
- Manley Society
- How You Can Give
- What You Can Give
- Donor and Advisor Resources
- Contact Us

**Talk To Us**  
Office of Planned Gifts  
St. Lawrence University  
312-329-6505  
33 Romoide Drive  
Canton, NY 13617

Did you know there are creative ways to support St. Lawrence University — ways in which St. Lawrence, you and your loved ones all benefit at the same time?

Such giving techniques are called "planned gifts," because with thoughtful planning, you create win-win solutions for you and St. Lawrence.

**Learn more about:**

- Year-End Giving
- Manley Society Award Winner
- Meet Our Donors
- A Gift That Costs Nothing
- Life Income Gifts
- Giving Stock

**COLLEGE OF Saint Elizabeth**

Apply Events Donate

Admissions Academics Campus Life Athletics Alumni About CSE News Info For Log In Give

## Planned Giving

Why Give?

- Create Your Legacy
- How You Can Give
- What You Can Give
- For Advisors
- Contact Us

**Contact Information**

**Planned Giving Office**  
Sally Cleary, CFRE  
Vice President for Institutional Advancement

**Phone:** 673-292-4455  
scleary@se.edu

Open a door once opened to you. Your legacy investment with the College of Saint Elizabeth gives you the opportunity to help prepare tomorrow's leaders with the education and values needed in today's world.

Your support is of great value for our students and it is our goal to make it rewarding for you as well. We can help you plan your gift so that it can return benefits to you. For example,

- You can make a gift using appreciated securities and realize larger tax savings than if you had used cash.
- You can make a gift that costs you nothing during your lifetime.
- You can make a gift that pays you income for life.
- You can preserve your estate for your children and deliver years of income to CSE. You can turn surplus life insurance coverage into a gift.

**Getting Started**

Give to the institution you care so much about, while maintaining control and flexibility.

**Learn How You Can Give >**

**Make a Bequest**

A bequest is a gift in your will and for most people is the most significant gift they will ever make.

**Learn About Bequests >**  
**Bequest Language for Donors >**

**XB XAVIER BROTHERS HIGH SCHOOL**

CALENDAR ALUMNI LOGIN

ABOUT ADMISSIONS ACADEMICS STUDENT LIFE ATHLETICS CAMPUS MINISTRY SUPPORT

## WHAT IS YOUR LEGACY?

Text + Text +

**TALK TO US**

- Our Office of Planned Giving >
- Call 781-801-1617

The task of ensuring Xavier's future rests with those who invest in the school with a vision for tomorrow.

Planned giving is a way to leave a lasting legacy of support for the school.

There are many vehicles to make a planned gift, all of which provide their own opportunities and advantages for you and Xavierian.

**PLANNED GIVING**

- Why Give? >
- Create Your Legacy >
- How You Can Give >
- What You Can Give >
- For Advisors >
- Contact Us >

**Getting Started**

There are many planned gifts that won't affect your existing financial resources, but will have a significant impact on Xavierian. Give to the institution you care so much about, while maintaining control and flexibility.

**Learn How You Can Give >**

**Make a Bequest**

A bequest is a gift provision in your will or revocable living trust. All assets, including cash, securities, real estate, and tangible personal property, may be transferred to Xavierian at the end of your life.

**Learn About Bequests >**  
**Bequest Language for Donors >**

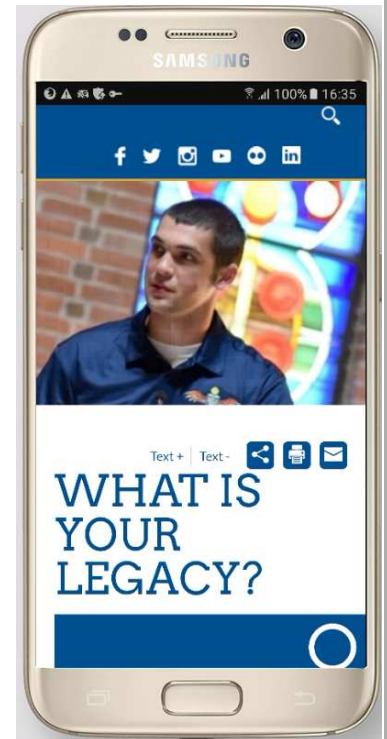
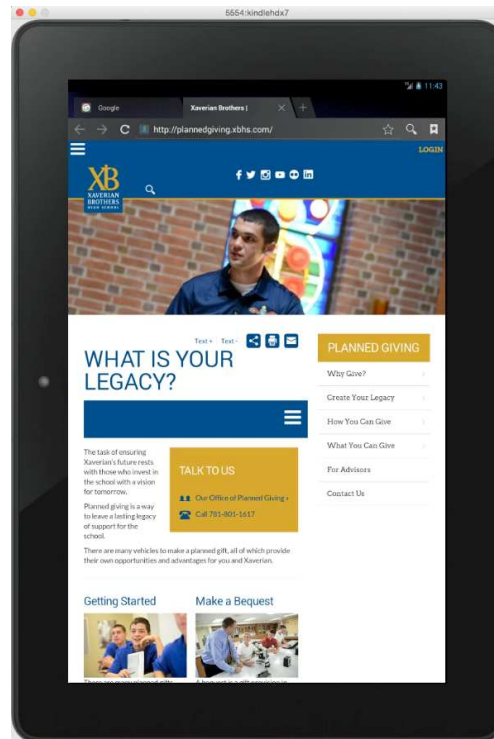
**The Ideal Gift for You?**

**Donor Stories**

plannedgiving.xbhs.com/how-you-can-give



# Mobile? No Rush...





# Be a Resource Center



**American Red Cross**  
Legacy Society

## Gifts of Retirement Assets



### A Tax-wise Way to Give

Did you know you can create a legacy at the American Red Cross without changing your will or parting with any assets now? You can designate the Red Cross as a beneficiary of your retirement accounts and benefit from one of the most tax-wise ways to support the organization you care about.

Making a gift of retirement plan assets, IRA's, 401(k), 403(b), and other qualified plans, is easy to do. You do not need to modify your will or living trust. You can name the Red Cross as the sole beneficiary or as one of several. This allows you to make a gift while still providing for family members or other loved ones. At your passing, that portion of left-over funds will be paid to the Red Cross in a lump sum, totally tax-free. In the meantime, the funds remain available to you should you need them to meet your own needs, and, if family circumstances change, you can adjust the portion allocated to the Red Cross.

Besides tax savings, a gift of retirement assets has other advantages:

- It is easy to arrange. You simply request a beneficiary designation form from your plan administrator. There is no need to change your will or living trust.
- You can designate the Red Cross as beneficiary of whatever portion you choose. For example, it might be 10 percent or 35 percent of the account. If you have otherwise provided for heirs, you could leave the entire balance to the Red Cross.
- The gift is revocable. You retain full control of your retirement funds should you need them, and you can change beneficiaries at any time.

### Taxation of retirement plan assets

Retirement assets are considered 'non-probate assets' and generally pass outside of the will or living trust. However, they are still considered to be a part of an individual's estate and the fair market value of these assets, along with all other estate assets, will be subject to possible state and federal estate taxes.

Every dollar your heirs receive (other than your spouse) from retirement accounts would be subject to income tax (unless the distribution derives from a Roth IRA). Depending on the size of the estate, retirement funds, like other estate assets, may be subject to estate tax. However, distributions from retirement accounts to a charity are subject to neither income tax nor estate tax.

### Example of Using an IRA to Make a Gift

#### Option 1

Give \$250,000 from your general estate assets to the Red Cross and the IRA to your children.

Income tax savings	\$0
Net cost of gift	\$250,000

#### Option 2

Give the IRA to the Red Cross and other assets to your children.

Estimated income tax savings (assuming a 35% combined federal and state tax rate for the children)	\$87,500
Net cost of gift (\$250,000 - \$87,500)	\$162,500

General rule: Upon death, it is better to make charitable gifts with IRAs and qualified retirement funds and give other assets such as cash, securities, and real estate to heirs.

### Outright Gifts of Retirement Assets

If you are over 59 1/2 years of age, you might also consider an outright gift from your IRA or 401(k) or 403(b) plan. While the withdrawal will typically be a taxable event, your charitable deduction would offset the taxable income, provided you itemize your deductions and can claim the full deduction in the year you make the gift.

**“I’m proud of the Red Cross, of how it brings the generosity of Americans right to where it’s needed most. I can’t think of a better way to make a real impact.”**

— Kim Elizabeth Manning - Red Cross Champion & Legacy Society Member

### Make a tax-free gift with an IRA charitable rollover (New as of 12/18/15)

You can make a tax-free gift from your traditional IRA (other qualified retirement plans such as 401(k)s and 403(b)s are not eligible). You must be at least 70 1/2 years old to take advantage of this opportunity. You must transfer your gift directly from your IRA administrator to the Red Cross. The total of all of your rollover gifts in any one year cannot exceed \$100,000 per person. A spouse with a separate IRA could also make a rollover gift of up to \$100,000 if they otherwise qualify.

### NEXT STEPS:

To receive further information and assistance on gifts of retirement plan assets, or to learn more about how your gift can help the American Red Cross, please contact:

- call 1-800-797-8022, ext. 5
- email [giftplanning@redcross.org](mailto:giftplanning@redcross.org)

\* The only exceptions to the possible double taxation are distributions from a Roth IRA or distributions attributable to contributions of after-tax dollars to other types of IRAs. Because everyone's situation is different, we encourage you to seek professional legal, estate planning, and financial advice before deciding on a course of action. This information does not constitute legal or financial advice and should not be relied upon as a substitute for professional advice.



By supporting the American Red Cross with your philanthropic donations, you help us to prevent and alleviate human suffering in the face of emergencies by mobilizing the power of volunteers and the generosity of donors.

American Red Cross  
Gift Planning Office  
American Red Cross  
Phone: 1-800-797-8022, ext. 5  
Email: [giftplanning@redcross.org](mailto:giftplanning@redcross.org)



# Be Prepared...

## INTERVARSITY

### Bequest Language for Donors

The following is intended to help you and your attorney in drafting a bequest that meets your individual interests. As you consult your attorney on the selection of appropriate wording to reflect your own goals and intentions regarding InterVarsity Christian Fellowship/USA, be sure the organization's correct legal name appears in all final documents as:

"The InterVarsity Christian Fellowship/USA, located in Madison, WI, or its successor, Federal Tax ID Number 36-2171714."

A **General Bequest** of a stated sum of money may be worded:

"I give to InterVarsity Christian Fellowship/USA, located in Madison, WI, or its successor, Federal Tax ID Number 36-2171714 [insert here the exact dollar amount]."

A **Specific Bequest** of a certain asset from your estate may be worded:

"I give to InterVarsity Christian Fellowship/USA, located in Madison, WI, or its successor, Federal Tax ID Number 36-2171714, [insert here a description of the particular assets or property]."

A **Residuary Bequest**, after other bequests and expenses have been paid, may be worded:

"I give to InterVarsity Christian Fellowship/USA, located in Madison, WI, or its successor, Federal Tax ID Number 36-2171714, all [or a portion] of the rest, residue and remainder of my estate."

A **Contingent Bequest** if the Testator is not survived by certain individuals:

"If [name/s of primary beneficiary/ies] do/es not survive me, or shall die within ninety (90) days from the date of my death, or as a result of a common disaster, then I give to InterVarsity Christian Fellowship/USA, located in Madison, WI, or its successor, Federal Tax ID Number 36-2171714, [insert here the exact dollar amount, description of property, assets, or percentage of residual estate]."

If you have any questions about bequest language or to learn more about how your gift can help InterVarsity Christian Fellowship, please contact our Estate & Gift Planning Team.

- call (608) 443-3685 or (866) 404-4823 x3685
- email [giftplanning@intervarsity.org](mailto:giftplanning@intervarsity.org)
- online [giftplanning.intervarsity.org](http://giftplanning.intervarsity.org)



### Bequest Language for Donors

The following is intended to help you and your attorney in drafting a bequest that meets your individual interests. As you consult your attorney on the selection of appropriate wording to reflect your own goals and intentions regarding Father Bill's & MainSpring, Inc., be sure the organization's correct legal name appears in all final documents as:

"**Father Bill's & MainSpring, Inc., a Massachusetts nonprofit corporation, or its successor, Federal Tax Identification Number: 22-2538039.**"

A **General Bequest** of a stated sum of money may be worded:

"I give to Father Bill's & MainSpring, Inc., a Massachusetts nonprofit corporation, or its successor, Federal Tax Identification Number 22-2538039 [insert here the exact dollar amount]."

A **Specific Bequest** of a certain asset from your estate may be worded:

"I give to Father Bill's & MainSpring, Inc., a Massachusetts nonprofit corporation, or its successor, Federal Tax Identification Number 22-2538039, [insert here a description of the particular property]."

A **Residuary Bequest**, after other bequests and expenses have been paid, may be worded:

"I give to Father Bill's & MainSpring, Inc., a Massachusetts nonprofit corporation, or its successor, Federal Tax Identification Number 22-2538039, all [or a portion] of the rest, residue and remainder of my estate."

A **Contingent Bequest** if the Testator is not survived by certain individuals:

"If [name/s of primary beneficiary/ies] do/es not survive me, or shall die within ninety (90) days from the date of my death, or as a result of a common disaster, then I give to Father Bill's & MainSpring, Inc., a Massachusetts nonprofit corporation, or its successor, Federal Tax Identification Number 22-2538039, [insert here the exact dollar amount, description of property, or percentage of residual estate]."

If you have any questions about bequest language or to learn more about how your gift can help Father Bill's & MainSpring, please contact Lucille Cassis.

- call (508) 427-6448 x2222 or (781) 654-1684
- email [lcassis@helpfbms.org](mailto:lcassis@helpfbms.org)



# Confidential Intention Form



Dear Donor,

We realize that many people who plan to support Moravian Seminary through their estate and/or financial plans prefer to keep their intentions private. However, by letting us know of your plans, we can thank you during your life, and confirm that we are able to fulfill your stated intentions.

Please know that completing this form is non-binding – we understand that you may change your plans at any time. Please also know that all information you share with us is kept strictly confidential.

Rev. Dr. Christine L. Nelson, Director of Seminary Advancement  
 Moravian Theological Seminary  
 Phone: (610) 625-7908  
 Email: nelsonc@moravian.edu

**Planned Gift Notification – Confidential**

**Personal Information**

Name: \_\_\_\_\_  
 Spouse Name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Phone: \_\_\_\_\_ Email: \_\_\_\_\_  
 Date(s) of Birth: \_\_\_\_\_

**Your Gift Intention**

Please provide the following information and attach a copy of the documentation or appropriate language from your will or trust, if available. Please complete all that apply.

- I/We want to support the mission of Moravian Seminary through a planned gift as described below:
  - I/We have included a bequest for Moravian Seminary in my/our will or living trust.
  - I/We have named Moravian Seminary as a beneficiary of an asset:
    - Retirement Plan       Bank, Investment, or Other Financial Account
    - Life Insurance Policy       Other: \_\_\_\_\_
  - I/We have named Moravian Seminary as a revocable/irrevocable (*circle one*) beneficiary of a charitable remainder trust.

The anticipated value of my/our gift is/will be approximately \$ \_\_\_\_\_ or \_\_\_\_\_ % of my/our estate. (*If possible, please include a copy of the bequest language or other wording describing your planned gift.*)

Please provide a general description of the gift provision (*such as, asset to be donated if other than cash or securities, how gift is to be used, whether gift is to create an endowment, etc.*):

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

- Yes, you may include me/us in listings of planned gift donors.

Please indicate how you would like your name(s) to appear in our **Legacy Society** listings. (*Please note the amount of your intended gift will not be published*):

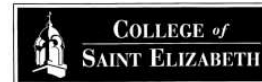
\_\_\_\_\_  
 \_\_\_\_\_

- No, please do not include me/us in listings.



# Stock Transfer Information

Click here for securities transfer instructions.



Office of Institutional Advancement

Telephone: 973-290-4465 Fax: 973-290-4447  
Email: [tsorce@cse.edu](mailto:tsorce@cse.edu) Website: [www.cse.edu](http://www.cse.edu)

## **HOW TO GIVE SECURITIES TO THE COLLEGE OF SAINT ELIZABETH**

First, please contact Tanya Sorce, Director of Annual Fund, at [tsorce@cse.edu](mailto:tsorce@cse.edu) or 973-290-4465 with stock information and when the gift is being made to the College.

Then, please follow the instructions below:

### **When stock is held by a brokerage firm or commercial bank:**

Instruct your broker or banker to electronically transfer shares of stock directly into the College of Saint Elizabeth's account held at Merrill Lynch. Our broker at Merrill Lynch is Gerald Dowling. His contact information is as follows:  
Telephone: 908-719-6416  
Email: [Gerald\\_dowlingJr@ml.com](mailto:Gerald_dowlingJr@ml.com)

Deliver to the following: College of Saint Elizabeth  
Account#: WCMA-6JL-02211  
DTC#: 5198  
Tax ID#: 221529785

### **When stock is held in certificate form:**

Please have the certificate re-issued as follows:

College of Saint Elizabeth  
2 Convent Road  
Morristown, NJ 07960-6989  
Tax ID#: 221529785

Then deliver or send the certificate of stock by certified or registered mail. A stock power, properly executed, should be sent separately. Both should be forwarded to the following:

Attn: Tanya Sorce  
Annual Fund  
College of Saint Elizabeth  
2 Convent Road  
Morristown, NJ 07960-6989

*For other transfers, please contact Tanya A. Sorce, Director, Annual Fund, at 973-290-4465 or [tsorce@cse.edu](mailto:tsorce@cse.edu).*

*Thank you for thinking of the College of Saint Elizabeth.*



# Conversion



## Plan Your Gift to Williams



Williams College offers a full range of charitable gift planning services to alumni, parents and friends. The Office of Gift Planning can help you explore a host of gift options that will allow you and your family to make a difference to present and future Eph generations.

This site offers ideas and information to help you consider and complete a planned gift to Williams. Explore [Giving Options here](#), or visit the navigation bar on the right. You can utilize our [gift calculator](#), learn about [The Ephraim Williams Society](#), find [sample bequest language](#), check a current issue of [Giftwise](#), our newsletter about planned giving, or simply read fellow Ephs' [personal giving stories](#).

[Getting Started](#)

[Make a Bequest](#)

### Gift Planning

[Why Give?](#) +

[Create Your Legacy](#) +

[How You Can Give](#) +

[What You Can Give](#) +

[The Ephraim Williams Society](#)

[Personal Stories](#)

[Gift Calculator](#)

[For Advisors](#)

[50th Reunion Gift Planning](#)

[Materials](#)

[Giftwise Newsletter Archive](#)

[Contact Us](#)

**Contact Us**

[Our Office of Gift Planning >](#)

[Call 413-597-3538](#)

**Contact Us**

[Our Office of Gift Planning >](#)

[Call 413-597-3538](#)



# Downloads Drive Traffic

## Take Charge!

Your Estate Planning Guide and Organizer



## Key Elements of an Estate Plan

### RELATED TO YOUR FINAL WISHES

- **Will.** A valid will is generally typed, dated, and signed by you as well as two legally competent witnesses. States differ as to whether a handwritten will, with or without witnesses, is valid.
- **Revocable Living Trust.** This can be used instead of a will as the main document disposing of your property. You might hear it referred to as a "living trust" or "RLT." The trust is created while you are living, most often people serve as their own trustee, and the power to change and even revoke it can be retained. The living trust becomes **irrevocable** upon your death. A living trust requires that you actually transfer your property into it for it to be effective.

There are pros and cons with each approach and an estate planning attorney can advise you as to which is best for your situation.

Note: even if you decide upon a revocable living trust, you should still have what is called a "pour-over" will. It catches any property that was, intentionally or inadvertently, left out of the trust during your life and is not transferred in another way. While this property will still need to go through probate, it will eventually be distributed according to your trust instructions instead of being distributed under state law provisions.



Take Charge: Your Estate Planning Guide and Organizer | 5

## Essential Information Organizer

*(Contains confidential and sensitive information — keep in a secure location)*

This questionnaire is designed to help you organize your important information. This will in turn help you when you go to see an attorney to prepare your will and other key planning documents. It will also help your loved ones at a time when they need it the most — if you are no longer able to make decisions for yourself or if you have passed away.

While it will take some time to complete, the time couldn't be better spent. While death (and taxes) is a certainty, when it will happen is not, and there are other uncertainties in life. Imagine the peace of mind that will come from knowing you have done all that you can do for yourself and your loved ones to be prepared for the unexpected. Gathering information is your first step in this process.

Date:

### I. You and Your Family

#### You

Full Legal Name

Maiden Name (if applicable)

Address 1

Address 2

Phone

Email

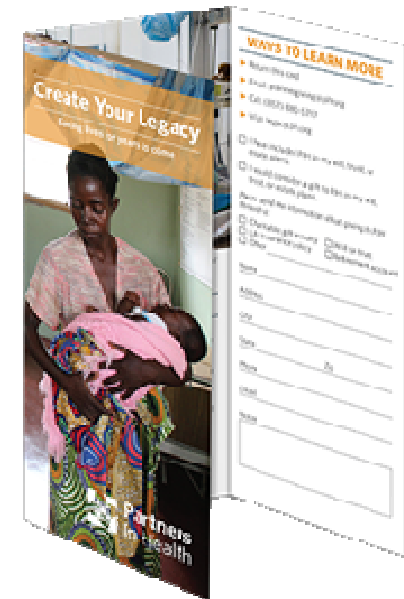
Take Charge: Your Estate Planning Guide and Organizer | 11





# Legacy Brochure

- Gives donors a quick understanding of your organization
- An overview of any planned giving subject
- Easy to share and leaves a lasting impression





# Simple Letter

## Education Changes Lives

*“As you look back fondly on your **Central Catholic** days, on your teachers, classmates or coaches, think about how you can help ensure future **CCHS** students have an education that is just as exceptional and life-changing as yours.”*





# Seminars

You can reach a variety of audiences, including volunteers, board members, and professional financial advisors. donors.


Estate planning, tax tips, income gifts, etc.





# Create a Giving Recognition Society

- Recognition is needed for revocable giving
- Good planned giving awareness
- Initiate a conversation about legacy planning
- Learn about unknown gift intentions
- People love to join groups to meet new like-minded people



**ST. LAWRENCE UNIVERSITY**  
**G. Atwood Manley Society**

**MEMBER INFORMATION FORM**

All records and details of gift plans are confidential and members can remain anonymous. Disclosing this information is NOT required for membership in the Society, but having such both helps the University plan for the future and helps make sure that your wishes are carried out. The Manley Society recognizes that most estate plans are subject to change as lives and circumstances change. Periodically, you may receive a request to confirm the information you have already provided. In any case, please provide as much of the below information as you are comfortable disclosing and return the form to the Office of Planned Gifts at the address listed at the bottom of this form. Please do not hesitate to contact us if you have any questions.

Name(s) \_\_\_\_\_ Class Year(s) \_\_\_\_\_

Mailing Address \_\_\_\_\_

Date(s) of Birth: \_\_\_\_\_ Is this plan joint with your spouse/partner? Yes / No

I have made provisions for St. Lawrence University in my estate as follows: Estimated Amount of the Current Value of Your Gift  
(Please check any or all that apply)

<input type="checkbox"/> Will or Living Trust	\$ _____
<input type="checkbox"/> IRA or Retirement Plan	\$ _____
<input type="checkbox"/> Life Insurance	\$ _____
<input type="checkbox"/> Charitable Trust	\$ _____
<input type="checkbox"/> Donor Advised Fund	\$ _____
<input type="checkbox"/> Other: _____	\$ _____

This provision is stated as a:

Specific dollar amount

Percentage (\_\_\_\_%)

Contingency (If so, please indicate below what must occur before St. Lawrence can receive the provision.)

\_\_\_\_\_

My gift is designated as:

Unrestricted (General operations)

Restricted for the following purpose: \_\_\_\_\_

May we publicly honor you as a member of the G. Atwood Manley Society so that others may be inspired to give through your example? Your name(s), but not the details or amount of your estate intention, would appear in our member listings.

Yes  No, I wish to remain anonymous.

In order to assure the University's continued ability to honor the wishes of its donors, St. Lawrence would welcome for its permanent confidential records a copy of your beneficiary designation form, Will or Trust or the appropriate section(s) thereof.

St. Lawrence University  
Office of Planned Gifts  
23 Romoda Drive  
Canton, NY 13617  
Phone: (315) 229-5505  
tselby@stlawu.edu



# Steward Your Donors

A good goal: visit/call every PG donor at least once a year

- Thank you gift when donor notifies you they have arranged a planned gift
- Thank you letter and/or call from President or a Board member
- Send birthday cards; holiday card(s)
- Insider report/letter twice a year
- Send timely news articles
- Invite for a tour, coffee with the President, meet a program expert



# Know Your Best Prospects

Keep your eyes open. Likely PG donors:

- Frequent, consistent givers
- Long-time donors (20, 30, 40 50+ years)
- Focus on 50+ (narrow to age 65+?)
- No children, and/or no heirs
- Engaged board members and volunteers
- Wealth – a secondary consideration

KNOW YOUR AUDIENCE





# Plan for Processing

- Plan for marketing leads
- Plan for gift administration
- A marketing vendor and/or software can help





# Advanced Planning

Your plan must be tailored to your mission.

- Establish and Articulate Objectives
- Define the Strategy
- Execute the Tactics
- Report, Analyze and Revise







# Constant Cultivation



*“ I see the impact of a Xaverian education in my brothers' eyes and in my nephew's eyes. I see the impact in my own life. ”*

— Jay McDermott '73

## 1% Can Change His Life

### Create a Legacy That Changes Lives.

Xaverian Brothers High School  
800 Clapboard Street  
Westwood, MA 02090

Have you established your will or an estate plan?  
Including Xaverian Brothers High School as a 1% beneficiary of your will or estate plan is simple and will have a significant impact on the lives of students.

If you remember Xaverian in your will or estate plan, you'll help underwrite the big ideas and bold dreams of the next generation of Xaverian graduates. It's a great opportunity to pay forward everything that Xaverian has meant to you.

For sample language that makes it easy to give through your will, please visit:  
[plannedgiving.xbhs.com/YourWill](http://plannedgiving.xbhs.com/YourWill)

Or contact:

Lamy Furey, P '21 Assistant Headmaster for Advancement (781) 801-1620 lfurey@xbhs.com	Jim Scholl '03 Assistant Director of Advancement (781) 801-1617 jscholl@xbhs.com
--	---



## How will you make a difference?

### It is a simple idea, yet a remarkably powerful one:

Christian Camps & Conferences, Inc.  
34 Camp Brookwoods Road  
Atton, New Hampshire 03805

Making a planned gift can change young lives, and be one of life's most satisfying experiences.

Estate planning is a necessary and selfless act of stewardship. Learn how a charitable gift, like a bequest in your will or a living trust, to Christian Camps and Conferences, Inc. can match your personal legacy goals.

Start today by downloading our FREE Estate Planning Guide at [heritage.christiancamps.net/guide](http://heritage.christiancamps.net/guide).

The planning you do today will ensure that **Camp Brookwoods, Deer Run, and Moose River Outpost** will continue its mission of fostering Christ-centered communities where lives are transformed for generations to come.

For more information, contact:  
Ann Higgins  
Director of Development  
ann@christiancamps.net or call (914) 260-4266

Learn more at [heritage.christiancamps.net](http://heritage.christiancamps.net)



SET YOUR HEART ON THINGS ABOVE... COL. 34

## The Future Starts Here

### Create an estate plan that brightens the future

Bishop Feehan  
70 Hicksett Drive  
Atleboro, MA 02713

New Profit Organization  
U.S. Postage Paid  
Atleboro, MA  
Permit No. 4

Have you established your will or an estate plan?  
Planning now will enable you to provide for the people and organizations that matter to you.

Including **Bishop Feehan** as a beneficiary through your estate plan is simple. You can specify any dollar amount, give specific property, or donate a percentage of your estate.

If you remember **Bishop Feehan** in your will or estate plan, you'll help underwrite the big ideas and bold dreams of the next generation of **Feehan** graduates. It's a great opportunity to pay forward everything that Bishop Feehan has meant to you.

For sample language that makes it easy to give through your will, please go to:  
[plannedgiving.bishopfeehan.com/YourWill](http://plannedgiving.bishopfeehan.com/YourWill)

Or contact:  
Chris Copley '73  
Director of Leadership Gifts  
Phone: (508) 226-7411  
Email: [ccopley@bhs.dfrcs.org](mailto:ccopley@bhs.dfrcs.org)



# Mailers

**Help Shape Our Future**

I/we would like information about:  
 How to include BB&N in my/our estate plans  
 Receiving income for life

I/we would like to inform you that:  
 I/we have included BB&N in my/our estate plans

Name/Class \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Email \_\_\_\_\_  
 Telephone \_\_\_\_\_

**BB&N** Buckingham Browne & Nichols School  
 250 Commonwealth Blvd  
 Cambridge, MA 02142

**“ Sending me to BB&N was a huge source of pride for my mother, a single parent. ”**  
 —Mark Leeds '83

**CREATE YOUR LEGACY**

**TELL ME MORE**

I would like information about:  
 The personal benefits of a Charitable Gift Annuity  
 How to include St. Sebastian's School in my estate plan

Name \_\_\_\_\_  
 Address \_\_\_\_\_  
 City, State \_\_\_\_\_ Zip \_\_\_\_\_  
 Email \_\_\_\_\_  
 Telephone \_\_\_\_\_

**ST. SEBASTIAN'S SCHOOL**  
 1000 St. Sebastian's Lane  
 Needham, MA 02462

Nonprofit Org.  
 US Postage  
 PAID  
 Boston, MA  
 Permit No. 19843

**THE SECURITY OF INCOME**

**ST. SEBASTIAN'S SCHOOL**  
 1000 St. Sebastian's Lane  
 Needham, MA 02462

**CREATE A LEGACY THAT CHANGES LIVES** **THE ALMY SOCIETY**

Across the decades, the experiences and memories of BB&N alumnae are often similar to those shared by Mark Leeds '83: caring teachers, lasting friendships, and preparation for further education and life.

This experience — made possible by generous financial aid from BB&N — motivated Mark to leave a lasting legacy to BB&N in memory of his mother, Beatrice Leeds (a huge Red Sox fan).

Mark wanted to honor her life and their shared dedication to BB&N by making a gift through his will to establish the Beatrice Leeds Financial Aid Fund.

Mark's charitable gift will give students of single parents, like himself, the life-altering opportunity of a BB&N education.

Will you consider joining Mark and others who are strengthening the future of BB&N?

To learn more about making a charitable gift to BB&N, please go to:  
[giftplanning.bbns.org/legacy](http://giftplanning.bbns.org/legacy)

For assistance, please contact:  
 Janet Rosen  
 Director of Stewardship and Office of External Affairs Communications  
[jrosen@bbns.org](mailto:jrosen@bbns.org) | 617-800-2729

The Almy Society is BB&N's opportunity to recognize those who have provided for the future of BB&N through their estate plans.

If you have included BB&N in your plans, please let us know so that we can welcome you into this society of alumnae and friends who share the desire to ensure that their vision and generosity have an impact well beyond their lifetimes.

We hope your charitable gift intentions will inspire others in our community to follow your leadership.

**A GIFT THAT PAYS YOU BACK**

Did you know your gift can ensure future St. Sebastian's School students have an education that is just as exceptional and life-changing as yours, while at the same time provide for your own financial future?

A Charitable Gift Annuity is called "the gift that pays you back" and its benefits include:

- You support St. Sebastian's with a substantial gift
- Payments you receive are partially tax free for a period of time
- You receive a charitable deduction in the year of your gift

As you look to the future, please consider including St. Sebastian's School as a part of your charitable giving. Your planned gift today will help our students of tomorrow.

For assistance, please contact:  
 Ed Davis '85  
 Office of Planned Giving  
 Phone: 860-247-0248  
 Email: [ed\\_davis@stsebs.org](mailto:ed_davis@stsebs.org)  
[plannedgiving.stsebs.org/annuity](http://plannedgiving.stsebs.org/annuity)

**HOW MUCH WILL I RECEIVE?**

A Charitable Gift Annuity is a simple contract between you and St. Sebastian's. In exchange for a gift of \$10,000 or more, St. Sebastian's will provide guaranteed fixed payments for life.

Age	Rate	Annually	Deduction
65	4.7%	\$470	\$3,930
70	5.0%	\$500	\$4,000
75	5.3%	\$530	\$4,170
80	5.6%	\$560	\$4,340

\*When the rate is 5.0% or higher, the guaranteed payment may be considered as part of your estate. Please see your advisor for more information or contact the Internal Revenue Service for more information.

Your planned gift to St. Sebastian's could be the smartest investment you ever make.

**ST. SEBASTIAN'S SCHOOL**  
 1000 St. Sebastian's Lane  
 Needham, MA 02462

NO POSTAGE  
 IF MAILED  
 IN THE  
 UNITED STATES

**BUSINESS REPLY MAIL**  
 POSTAGE WILL BE PAID BY ADDRESSEE  
 ST. SEBASTIAN'S SCHOOL  
 1000 ST. SEBASTIAN'S LANE  
 NEEDHAM, MA 02462-9945

## I WANT TO CHANGE LIVES, TOO.

- Yes, I'm interested in learning more about how to make a charitable gift in my will.
- Yes, I have included a charitable gift to Wheeler in my will or estate plan.

Name and Class Year \_\_\_\_\_

Preferred Phone \_\_\_\_\_ Best time to call \_\_\_\_\_

Email \_\_\_\_\_

Address \_\_\_\_\_

City, State \_\_\_\_\_ Zip \_\_\_\_\_

**W** THE WHEELER SCHOOL  
The Wheeler School  
216 Hope Street  
Providence, Rhode Island 02906-2246

PRESORT FIRST  
CLASS MAIL  
U.S. Postage  
PAID  
Providence, RI  
Permit No. 1923



## THE SPIRIT OF GIVING THAT LIVES FOREVER

## WITH A FUTURE GIFT TO WHEELER, YOUR'S CAN TOO!

**Honor your friendships, teachers, coaches or family members with a gift to Wheeler's endowment in your will or estate plan.**

*"Many of my closest friends are Wheeler alumnae – and that makes the bonds that are formed at Wheeler very important to me... Sadly, several of my Wheeler friends passed early and this pushed me to plan for how my money will be allocated when I am no longer here."*

– Cristiana Quinn '80

*"I learned the tradition of giving to education from them (my parents) and I want to continue advocating for education after I am gone. Education is the one thing that can never be taken away from you."*

– Dr. Marlene Cutitar '79

**Support a program that taught life-lessons and helped 'get you on your path'.**

*"I learned to be a life-long learner at Wheeler. This curiosity was critical to my success in college and later. High school is a big part of the formative years, where you get on 'your road'. I want to support the kind of environment that really gets you on your path."*

– Rob Glancy '01

*"To be able to remember, at the end of your life, those who are important to you and to thank those organizations from which you benefited is invaluable. At the end of the day, it is not what you have accumulated that matters, but what a difference you can make."*

– Alan and Marianne Litwin

**Remember a place on campus, like the Farm, that holds special meaning for you or your family. The Singer family is doing just that and had this to say about their future support:**

*"Don't fear that your gift has to be something huge or impressive. Small gifts made by many people over time have been the root of many of the remarkable qualities we see in the Wheeler of today."*

– Amy Baumgartel Singer '89

**To explore ways to create your Wheeler legacy, please return the reply card or contact:**

Michele Sczerbinski Diaz '86  
Director of Leadership & Planned Giving  
(401) 528-2132  
michelediaz@wheelerschool.org  
[giftplanning.wheelerschool.org/YourLegacy](http://giftplanning.wheelerschool.org/YourLegacy)

**Make an investment that truly changes lives, like a gift to scholarship endowment. A gift in 1986 of \$10,000 is now worth approximately \$62,000 providing an annual award of about \$2,400.**

*"There's no grander investment, where you can see such payback. Education is the most potent gift. In my mind you see the greatest value for your money when you create a scholarship."*

– Dr. Charles and Sarah Denby

**W** THE WHEELER SCHOOL



# Print Newsletters



**EDMUNDITE Missions**  
OFFICE OF Planned Giving  
1428 Broad Street  
Selma, Alabama 36701  
Phone: (334) 407-1625  
stevh@edmunditemissions.org

NONPROFIT ORG.  
U.S. POSTAGE  
**PAID**  
PERMIT NO. 5333



## Donor Spotlight: Marie Schumacher

Two years ago, Edmundite Missions was blessed with a wonderful gift. Marie Schumacher (pictured) responded to our call for help with a donation of a van to help deliver meals for those that can't travel to our Bosco Nutrition Center. The van was equipped to deliver 150 meals each day and able to keep cold items cold and hot items hot. Shortly after the gift, the Missions was able to "leverage" Ms. Schumacher's gift and approach a national retailer to match her generosity.



Marie challenges all of us to be creative in our giving!

Your ongoing support is greatly appreciated.

In partnership,

Steve Hubbard,  
Director of Planned Giving

"Edmundite Missions is a Catholic organization rooted in the Gospel of Jesus Christ. Providing food, clothing and shelter to poor and marginalized children and families, young adults and seniors of all faith traditions to meet their immediate needs and help them address the long term issues of systemic poverty in the Deep South."



*"Thanks to your generous gifts, Edmundite Missions served more than 300,000 meals last year"*

**EDMUNDITE Missions**

Contact us at (334) 407-1625 to get started.

NO POSTAGE  
NECESSARY  
IF MAILED  
IN THE  
UNITED STATES

**BUSINESS REPLY MAIL**  
FIRST CLASS MAIL PERMIT NO. 78 SELMA, AL  
POSTAGE WILL BE PAID BY ADDRESSEE

EDMUNDITE MISSIONS  
PO BOX 2114  
SELMA, AL 36702-9902



# Print Newsletters



*"Hungry Seniors depend on Edmundite Missions for hot, healthy meals, as well as spiritual nourishment."*

## Why You Should Include Edmundite Missions In Your Will

There is a common misconception that only the wealthy need to make a will. This is not true. A will eases the pain of your passing on those you leave behind, and without a will, regardless of your personal wishes, state laws will determine the transfer of your estate.

There is an even bigger misconception that only the wealthy leave money to a charity when they die. This is not true. The fact is that most gifts by will, (bequests), are made by everyday people who want to have a lasting, positive impact on their community.

Without this type of generosity, Edmundite Missions may find it difficult to continue to serve those in need.

Here are three reasons why you should include Edmundite Missions in your will:

### *A Gift By Will Is Easy To Make*

A bequest is one of the easiest charitable gifts to make. It is simple to implement, and easy to change should you ever need to. You can give specific property or designate a dollar amount or a percentage of your estate. You can also designate Edmundite Missions as a beneficiary of your retirement plan or life insurance policy.



### *A Gift By Will Does Not Alter Your Current Lifestyle*

Making a bequest is a way of demonstrating your commitment to Edmundite Missions. It doesn't affect your current cash flow. Gift bequests can easily be modified to address your changing needs.

### *A Gift By Will Can Change Lives*

A bequest can help Edmundite Missions further its work and values. It can continue making a difference for generations to come.

## Estate Planning

### How to prepare when meeting with an attorney:

Meeting with an attorney in this situation is to put your mind at ease, put your plan into action, and proactively prepare for the future.

So, how does one make the best of this good situation? How does one prepare for meeting with an estate planning attorney? In all likelihood it will start with completion of a questionnaire provided in advance by the attorney, where you will provide information about your assets, identify family members and friends, and indicate what estate documents are currently in place.



The following items to consider when preparing to meet with an estate planning attorney:

- *Who would I name to serve in certain roles in my estate: executor/personal representative, power of attorney for financial matters, power of attorney for health issues?*  
They need not be the same people, and because the responsibilities are different it may well be best to have different people handling each role.
- *What items should I consider in leaving an inheritance for my family members?*  
Life circumstances often point to creating unique arrangements for individuals that are listed in one's will.

- *What are my biggest worries as I think about planning my estate?*  
These will depend on the particular circumstances of your life situation, but might include preserving or passing on a family business, protecting the estate from lawsuits or creditors, providing for children from a prior marriage, or anticipating a will contest or disagreement among family members.

- *What are my biggest priorities as I think about planning my estate?*  
It may involve providing for your children, or helping your grandchildren with their education. It may be taking care of extended family, or friends that have become like family. It may be "making a difference," through a gift to Edmundite Missions that you have supported during life, or by making a memorial gift in honor of someone.

You don't have to have all the answers before you meet with your attorney. In fact, part of their role as an advisor is to help guide you through these types of issues. The more you can identify these areas, or describe why you have made certain choices, the better able your attorney is to prepare the estate plan that is right for you.

For more information about making a gift by will or trust, please contact:

Steve Hubbard  
Director of Planned Giving  
(334) 407-1625  
steveh@edmunditemissions.org.

Our legal name is:  
Fathers of St. Edmund Southern Missions, Inc.

EDM# 63-030230



Name(s) \_\_\_\_\_  
 Address \_\_\_\_\_  
 City, State, Zip \_\_\_\_\_  
 Home Phone \_\_\_\_\_  
 Other Phone \_\_\_\_\_  
 Email Address \_\_\_\_\_

For confidentiality, tear, fold, tape and return.

I am pleased to inform you that:

- I have included Edmundite Missions in my estate plans
- I am considering including Edmundite Missions in my estate plans

Please send me information on the following:

- A gift by will or trust
- Charitable gift annuities

If you have any questions, please call Steve Hubbard, Director of Planned Giving, at (334) 407-1625, or email [steveh@edmunditemissions.org](mailto:steveh@edmunditemissions.org).



# Leave Behinds...



## Leaving a Legacy to TFA

If you wish to leave a bequest to Teach For America, the process is relatively simple.

As you consult your attorney on the selection of appropriate wording to reflect your own goals and intentions regarding Teach For America, be sure that our correct legal name appears in all final documents as:

**"I give to Teach For America, having a principal place of business at 25 Broadway, 12th floor, New York, NY 10004, Federal tax identification number 13-3541913, \_\_\_\_ percent of my residuary estate (or \$\_\_\_\_, or other property) to be used or disposed of in its sole discretion as it deems appropriate."**

### Types of Bequests

**Specific Bequest:** Teach For America receives a specific dollar amount, a specific piece of property or a stated percentage of the estate. This is one of the most popular forms of bequests.

**Residuary Bequest:** Teach For America receives all or a stated percentage of an estate after distribution of specific bequests and payment of debts, taxes and expenses.

**Contingent Bequest:** Teach For America receives all or part of the estate under certain specified circumstances, such as the death of another beneficiary.

**Unrestricted:** This type of gift is a gift that Teach For America may use for its general purposes. An unrestricted gift is very useful to Teach For America because Teach For America will have flexibility to put the gift to the best possible use at the time it is received.

**Restricted:** A restricted gift is given to Teach For America with instructions for a specific purpose, such as support for a special project or program that is important to you. Please consult with the Office of Gift Planning prior to establishing your restrictions to ensure that Teach For America is able to carry out your wishes.

### Next Steps:

To receive further information and assistance on estate planning, or to learn more about how your gift can help Teach For America, please call our Office of Gift Planning.

- call (646) 300-3957
- email Rachel.Smith2@teachforamerica.org

Teach For America - Estate Planning Guide | 7

## Estate Planning Documents Inventory

### The Essentials

- Will
- Letter of Instruction
- Trust Documents

### Marriage and Divorce

- Marriage License
- Divorce Papers

### Health-Care Confidential

- Personal and Family Medical History
- Durable Health-Care Power of Attorney
- Authorization to Release Health-Care Info
- Living Will
- Do-Not-Resuscitate Order

### Life Insurance and Retirement

- Life Insurance Policies
- Individual Retirement Accounts
- 401(k) Accounts
- Pension Documents
- Annuity Contracts

### Proof of Ownership

- Housing, Land and Cemetery Deeds
- Escrow Mortgage Accounts
- Proof of Loans Made and Debts Owed
- Vehicle Titles
- Stock Certificates, Savings Bonds and Brokerage Accounts
- Partnership and Corporate Operating Agreements
- Tax Returns

### Bank Accounts

- List of Bank Accounts
- List of all User Names and Passwords
- List of Safe-Deposit Boxes


### Electronic Assets

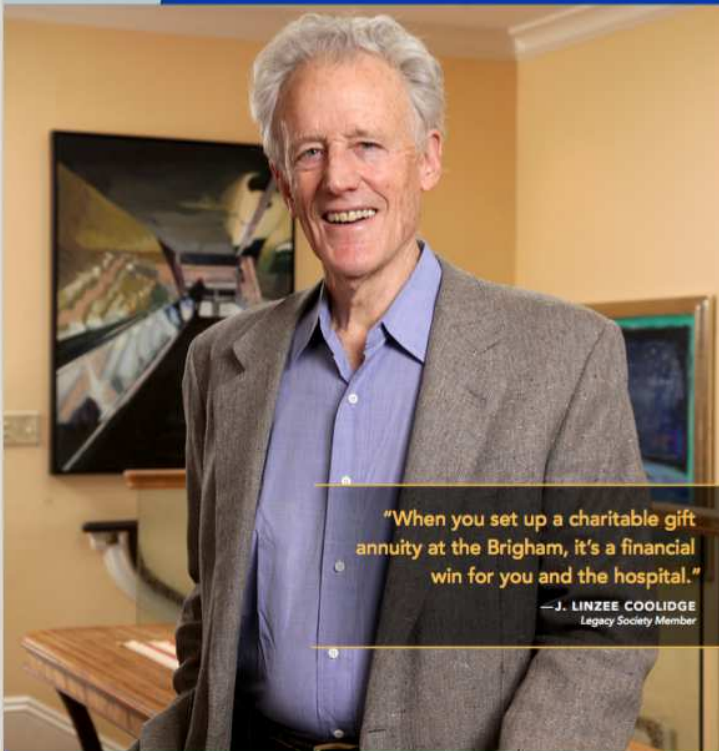
- Current banking and other electronic passwords in a secure form for your heirs (banking, mortgage, retirement accounts, trusts, social media like Facebook or LinkedIn, etc.)

Teach For America - Estate Planning Guide | 8




# Sell Sheets



Invest in life-giving breakthroughs.





“When you set up a charitable gift annuity at the Brigham, it’s a financial win for you and the hospital.”

—J. LINZEE COOLIDGE  
Legacy Society Member









## Honoring the Brigham's History—and its Future

For more than 50 years, J. Linzee Coolidge has ardently supported Brigham and Women's Hospital (BWH). In 1963, he became the youngest Board of Trustees member of the Peter Bent Brigham Hospital—a predecessor hospital of BWH—and has remained involved as a loyal advocate and generous donor.

“It’s one of the foremost hospitals both in research and medical care, and provides excellent medical support in the community. A hospital is one of the most important institutions in any city and the Brigham is doing one of the best jobs at it.”

Generations of Linzee’s family received their care at the Brigham. “My father and great uncle, who also served on the board, received excellent care here. It has been an important institution in our lives and our community, and I want to see it continue to develop innovations that save lives,” he says.

Linzee has supported a variety of initiatives at BWH, including The President’s Unrestricted Fund, global

health, and the work of his personal physician, Marshall A. Wolf, MD. He is also very happy to make another contribution that promises to accomplish good far into the future: a planned gift known as a charitable gift annuity.

“When you set up a charitable gift annuity at the Brigham, you receive a tax advantage up front and a guaranteed income,” Linzee says. “You also feel good knowing you are helping people who will rely on the hospital’s care for years to come. It’s a win-win.”

In recognition of Linzee’s gift, he was welcomed into The Legacy Society of Brigham and Women’s Hospital and Brigham and Women’s Faulkner Hospital (BWFH) where he and other planned giving donors are celebrated for their dedication.


He adds, “Once you’re connected, it’s your hospital. The example you set can help other donors realize how important everything that goes on at the hospital is, and how important it is to get involved.”

## How a gift annuity works


A charitable gift annuity (CGA) is an exciting way to make an impact in the future of medicine, while receiving income for life. This irrevocable gift can be funded with cash or appreciated securities. In exchange, BWH or BWFH will pay you or a loved one guaranteed fixed payments for life, regardless of market fluctuations or inflation. Upon the death of the last income beneficiary, the hospital will receive the remainder of the annuity to support a specific area of the hospital that you choose. Or you can allow BWH or BWFH to direct it toward The President’s Unrestricted Fund, a vital resource that can help us accelerate life-giving breakthroughs.

**Advantages of a CGA**

- You can begin receiving payments in the year in which you make your gift, or you can defer payments to a future date, let the principal grow, and enjoy a higher payout rate
- A CGA can provide you, a spouse, or a loved one with guaranteed income for life
- You will receive a charitable income tax deduction in the year you make your gift, even if you defer your annual payments
- You will be welcomed into The Legacy Society—an honorary group that recognizes and celebrates those who have included BWH or BWFH in their long-term plans



Please contact Kathleen Duffy, senior director of gift planning, at 617-424-4326 or visit [bwhgiving.org/giftplanning](http://bwhgiving.org/giftplanning) for more information about how to include BWH or BWFH in your estate plans and join The Legacy Society.



**Life. Giving. Breakthroughs.**  
OUR CAMPAIGN FOR THE FUTURE OF MEDICINE.



# Brochures

## EXAMPLE

James W., age 76, contributes \$10,000 cash. He receives a lifetime annuity of \$600, of which \$460 is tax-free for approximately the first twelve years. He also receives an income tax deduction of \$4,574 that reduces his income taxes in the year of his gift.

### SAMPLE ANNUITY RATES\*

Minimum gift amount is \$10,000 and the minimum age is 65 years old.

Gift Amount	Age	Payment Rate	Annuity	Deduction
\$50,000	65	4.7%	\$2,350	\$17,449
\$50,000	66	4.8%	\$2,400	\$17,650
\$50,000	67	4.8%	\$2,400	\$18,947
\$50,000	68	4.9%	\$2,450	\$19,421

\* Based on rates recommended by the American Council on Gift Annuities (subject to change).

## HOW YOUR GIFT HELPS

Your gift will help us provide a formation program to seminarians, who were sent by their bishop to the Eternal City. This opportunity to live and study in the shadow of St. Peter's enhances their human, spiritual, intellectual, and pastoral preparation so that they may be formed as priests according to Heart of Jesus Christ.

Established in 1859, we look forward to another century of service to the Church. By establishing a gift annuity, you will help us provide the Church with holy, courageous priests who will touch thousands of lives over the course of their ministry.



For more information, please contact:

Mark Randall, CFRE  
 Executive Director, Institutional Advancement  
 The Pontifical North American College  
 3211 Fourth Street, NE  
 Washington, DC 20017-1194  
 (202) 541-5403  
 mrandall@pnac.org  
 www.pnac.org



## GIFT ANNUITIES

Creating a Legacy at  
 The Pontifical North American College





# Brochures

## A GIFT THAT PAYS YOU BACK

Would you like to support Pontifical North American College but are hesitant because of the uncertainties of today's market?

Perhaps you are concerned about being able to meet your future financial needs. Don't worry, you still can include Pontifical North American College in your financial plans by funding a charitable gift annuity.



*"I am so pleased to be able to support the College and, at the same time, to benefit from a tax write-off and the security of supplemental income."*

— Charlotte Rossi

A charitable gift annuity is a simple arrangement between you and Pontifical North American College that requires a one or two page agreement. There are minimal or no costs to you to establish the arrangement and no costs at all to maintain it.

By funding a charitable gift annuity you will provide valuable support to Pontifical North American College and receive a charitable income tax deduction and fixed payments for your lifetime or the lifetime of a loved one. Pontifical North American College will benefit from the remainder of your gift after your lifetime payments.



## HOW IT WORKS

Charitable gift annuities may be funded with cash, securities, or property.

The payout rate of a charitable gift annuity is based on the age of the individual(s) at the time the gift is made. The older you are when you make your gift, the greater the payment rate you will receive.

You decide who will get the payments from your gift annuity. Usually, this will be you, or you and your spouse. You can, however, select any one or two people to receive the payments from your gift annuity. For example, you may wish to provide income for aging parents, a sibling, or to support your grandchildren's education.

A charitable gift annuity could be right for you if:

- You want to maintain or increase your income.
- You want the security of fixed, dependable payments for life.
- You want to save on income taxes or capital gains taxes.
- You would like income that may be partially tax-free.
- You are considering a gift amount of \$10,000 or more.
- You are at least 65 years of age.

If you would like to receive a personal illustration or learn more about life income gifts, please contact Mark Randall, CFRE, Executive Director, Institutional Advancement at (202) 541-5403.

Working together, we can find the right gift that will reflect your wishes and make a lasting difference for Pontifical North American College.



# Digital Too!

**TARTAN TRADITIONS**  
CREATIVELY CONSIDERING YOUR LEGACY | FALL 2016

Home Why Give? Create Your Legacy How You Can Give What You Can Give

**Andrew Carnegie: Our Philanthropic Heritage**  
Greetings from the Office of Gift Planning at Carnegie Mellon University and welcome to the inaugural edition of Tartan Traditions!  
This periodic publication is designed to provide you with timely information on transformative philanthropic strategies and inspirational donor stories.  
Read more

**The IRA Charitable Rollover: What You Need to Know**  
A gift to CMU of your distribution from your IRA qualifies for the charitable deduction, therefore allowing you to deduct from your taxable income your IRA distribution.  
Read more

**Dr. William F. Pounds: Investing for The Future**  
Bill Pounds' remarkable career can be attributed to the learning environment he experienced at the Graduate School of Industrial Administration (now the Tepper School).  
Read more

**About Us**  
By supporting Carnegie Mellon University with your philanthropic donations, you are helping Carnegie Mellon meet the changing needs of society by building on its traditions of innovation, problem solving, and interdisciplinary research and teaching.

**Contact Us**  
Joseph O. Bull, JD  
Executive Director of Gift Planning  
Carnegie Mellon University  
412-266-3349  
jso@pursuit@andrew.cmu.edu

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**GENERATIONS**  
Wheaton College  
Spring 2016

Home Why Give? Create a Legacy How You Can Give What You Can Give

**Christie Kennedy Wyman '87**  
"A lesson on a rewarding gift that pays you back, from a kindergarten teacher... Christie Kennedy Wyman '87 loved her Wheaton College experience. With small class sizes that were intimate, and professors who were accessible and interested, she found it easy to form lasting friendships with both classmates and professors.  
Read more

**Contact Us**  
Office of Gift Planning  
giving@wheatoncollege.edu  
508-280-3459  
Email Us

**More on Deferred Gift Annuities**

**A Gift that Pays You Back When You Need It Most**  
Many of us cannot afford to make a major gift in our lifetime. But we can set up a legacy gift now so you and Wheaton College receive a great gift in the future.  
Read more

**Wheaton Means Impact: Growing Our Influence on the World**  
An expression of our collective strengths as a community and of our aspirations for the future, Wheaton's strategic plan was developed after hundreds of conversations among faculty, staff, students and alumni.  
Read more

**You provide an immediate and powerful impact for today's students when you give through the Wheaton Fund. Be the difference today.**

**BE THE DIFFERENCE**  
Wheaton College  
By supporting Wheaton College with your...  
Michelle Kovach  
Director of Gift Planning  
Wheaton College

**MCPHS UNIVERSITY** Legacy Planning August 2016

**Greetings From MCPHS**  
It's an eternal question with no definitive answer-Does "summer life" slow down or speed up?  
Read more

**The Unplanned Vacation**  
Would you ever walk out the door one morning and instead of going to work or the gym just go on a vacation for a month or two?  
Read more

**Giving Made Easy**  
Although the calendar shows that it's the middle of summer, the holiday gift that Congress delivered last December keeps on giving.  
Read more

**About Us**  
By supporting MCPHS University with your philanthropic donations, we can continue to prepare students for successful careers in healthcare through excellence in teaching, research, and professional service.

**Contact Us**  
MCPHS University  
Office of University Advancement  
Lorrie Townley  
617.732.2230  
lorrie.townley@mcpchs.edu

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**ST. SEBASTIAN'S SCHOOL** Planned Giving eNewsletter Spring 2016

Planning Ahead How You Can Give What You Can Give For Advisors

**Giving Back to St. Sebastian's**  
Dear Fellow Alumnus,  
Our Headmaster Bill Burke often refers to parents who when asked how their son is doing will say, "he's never worked harder and never been happier." Think about it, what a great reason from our parents. What an opportunity St. Sebastian's provides for its students.  
In so many wonderful discussions with our alumni over the years you have told me story after story that exemplify how the St. Sebastian's mission of "Love God, Work Hard and Take Good Care of One Another" has so positively manifested itself in your every day lives. Whether it be in the building of relationships, starting, raising and nurturing of a family or building a successful career we so often look back and credit our St. Sebastian's experience for the many blessings we have. We are so fortunate to be Alums.  
"The happiest days of my life..." I owe so much to my parents for sending me to St. Sebastian's, "My home away from home." My teacher became my lifelong friend and all common assertions of how much the St. Sebastian's experience means to most of us. The thought of giving back seems natural and over the years many of you have mentioned that you have or have thought of naming St. Sebastian's as a beneficiary in your will, or doing something special for our school. If you have already made arrangements through your estate plan please be sure to let us know. We want to be sure to thank you and honor you in our Annual Report section on Planned Giving and the Monsignor Charles D. Molinis Society.  
For those who have it on their agenda, please call so that I may assist you in any way I can. My number and e-mail address is (508) 397-4976, and ed\_davis@stsebs.org. You can also go to [plannedgiving.stsebs.org](http://plannedgiving.stsebs.org) to learn more about available options in Planned Giving.  
Thank you so much for your continued Leadership, Generosity and Support.  
Sincerely,  
Ed Davis  
Director of Planned Giving

**Income for You, Support for St. Sebastian's**  
Would you like to support your favorite charity, but are hesitant to do so because of the current market unfamiliarity?  
Read more

**Planned Giving Profile: Hanford T. "Bing" Crosby Jr.**  
Hanford T. "Bing" Crosby Jr. '55 recalls St. Sebastian's as "a wonderful place to come each day."  
Read more



# Single Issue Email



## A Legacy Made Simple

It only takes a minute to make a lasting impact

A simple way you can show your support is to name **Carnegie Mellon University** the beneficiary of your:

- Retirement plans, such as an IRA, your 401(k), 403(b), etc.
- Bank and brokerage accounts, or
- Life insurance policy

Beneficiary designations let you specify both the individuals and charities you want to support and the percentage of the assets you want each beneficiary to receive. These gifts are excellent ways to utilize income tax savings to enhance your CMU philanthropy. And it's literally as easy as filling out a form.

You can obtain a Change of Beneficiary form by contacting the retirement plan administrator, bank or insurance provider. The form takes just a few minutes to complete, yet your legacy at CMU will be realized for generations to come.

For more information click [here](#).



If you have any questions, please contact:

Joseph O. Bull, JD  
Executive Director of Gift Planning  
Carnegie Mellon University  
412-268-5346  
askjoebull@andrew.cmu.edu



## CREATE YOUR LEGACY WITH YOUR RETIREMENT ASSET

The IRA charitable rollover is a terrific way to make a tax-free gift to Brooklyn College. If you are 70 ½ or older, you can tell your IRA administrator to transfer your gift directly from your traditional IRA or Roth IRA account to Brooklyn College.

You can make a gift of up to \$100,000 to satisfy the required minimum distribution from your IRA. The gift will not be taxed as income to you. You don't get an income tax charitable deduction for the gift, but you don't pay taxes on your IRA withdrawal, which means the IRA charitable rollover is tax-free.

We can provide sample letters of instruction to send to your IRA administrator in order to make an IRA charitable rollover.

If you are interested in making such a gift or would like more information, please contact The Brooklyn College Foundation at 718.951.5074, or email [legacysociety@brooklyn.cuny.edu](mailto:legacysociety@brooklyn.cuny.edu).

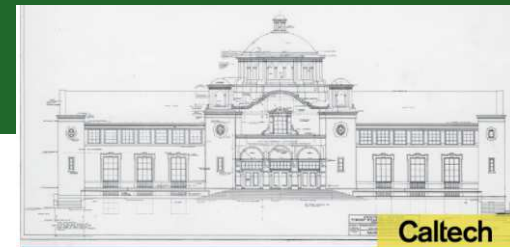
Learn more at [plannedgiving.brooklyn.cuny.edu/IRA](http://plannedgiving.brooklyn.cuny.edu/IRA).



### Contact Us

Brooklyn College Foundation  
718.951.5074  
[legacysociety@brooklyn.cuny.edu](mailto:legacysociety@brooklyn.cuny.edu)

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## Turn Property into Possibility

Donating your real estate can benefit Caltech *and* you.

Did you know that you can donate real estate to Caltech as a charitable gift?

Whether it's your home, your second home, a rental property, a commercial building, or another real estate holding, you can use it to advance world-changing research and education.

Making a gift of real estate could be the right choice for you. There are numerous ways to give, including options that reduce your income tax burden and some that generate income for you.

Some common approaches:

- If you no longer want responsibility for real estate that you own, you can make a gift and support Caltech during your lifetime.
- If you are interested in donating your home as long as you can continue to live in it, you can transfer ownership to Caltech but remain in your home as long as you wish.
- If you are willing to sell your real estate to Caltech for less than its appraised value, you can offset capital gains tax while also earning income.
- If you want periodic payments as a benefit of your gift of real estate, you can receive income for life through a charitable remainder trust.
- If you want to hold on to some of your real estate, you can keep a portion and give the remainder to Caltech.
- If you want to retain ownership and give real estate through your estate, you can make a bequest to Caltech.

To start a conversation about real estate or would like more information, please call our Office of Gift Planning at 626-395-2927, email [giftplanning@caltech.edu](mailto:giftplanning@caltech.edu)

Learn more at [plannedgiving.caltech.edu/realestate](http://plannedgiving.caltech.edu/realestate)

### The Torchbearers of Caltech

Membership in the Torchbearer Legacy Society is extended to individuals who have provided for Caltech in their estate plans or other planned gifts. If you have already done so, we hope you will [let us know](#) and allow us to include you in this esteemed group of Caltech alumni and friends who share the desire to ensure that their support continues beyond their lifetime.

Photography: Calder Arches, 1933; Caltech Archives

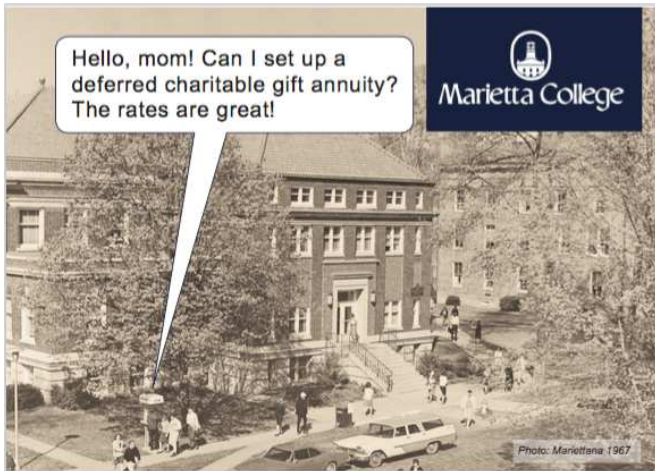
This postcard is intended for educational purposes only and is not offered and should not be taken as legal, tax, or other professional advice. Always consult an attorney, accountant, or other professional advisor before making any material decisions based on any data presented herein. To ensure compliance with certain IRS requirements, we disclose to you that information contained in this postcard is not intended or written to be used, and may not be used, for the purpose of avoiding tax-related penalties. January 2017.



Contact Us  
Office of Gift Planning



# Stand Out From The Crowd



## A GIFT THAT GIVES BACK... ...WHEN YOU NEED IT

If you're looking for ways to support Marietta College and prepare for your retirement, a deferred charitable gift annuity may be your answer.

A deferred charitable gift annuity provides fixed payments to you for life in exchange for your gift of \$10,000 or more. The payments start on a date you choose that is at least one year after you make the gift.

**Other benefits include:**

- You support Marietta College with a substantial gift.
- Payments you receive are partially tax free.
- You receive a charitable deduction in the year of your gift.

**For a gift of \$10,000, how much income will I receive?**

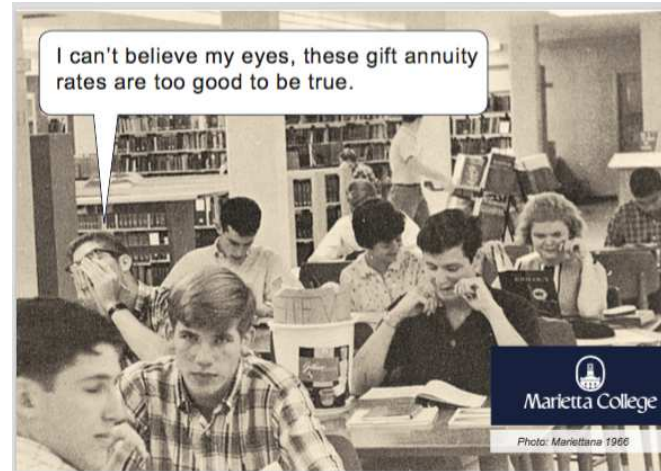
Age	Years Deferred	Annuity Rate	Annuity Amount	Charitable Deduction
65	8	7.0%	\$700	\$4,552
70	6	7.2%	\$720	\$5,012
75	5	7.9%	\$790	\$5,693
80	4	8.8%	\$880	\$6,388

If you would like to learn more, please contact:  
Jarrett S. Stull  
740-376-4446  
email: jarrett.stull@marietta.edu  
Please visit:  
giftplanning.marietta.edu/DCGA



Marietta College  
Office of Advancement  
215 Fifth Street, Marietta, OH 45750-4004

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## A GIFT THAT PAYS YOU

Did you know you can extend your support with a gift that will provide you with lifetime payments in return?

In exchange for your gift of \$10,000 or more, you can make a positive impact at Marietta College and receive personal financial benefits, including:

- Secure fixed payments to you for life
- A charitable deduction in the year of the gift
- Payments you receive are partially tax free for a period of time
- You support Marietta College with a substantial gift

**For a gift of \$10,000, how much income will I receive?**

Age	Annuity Rate	Annuity Amount	Charitable Deduction
65	4.7%	\$470	\$3,231
70	5.1%	\$510	\$3,901
75	5.9%	\$590	\$4,426
80	6.8%	\$680	\$4,908

\* Please note that this information is for illustrative purposes and is not intended as tax or legal advice. Rates are subject to change and are based on rates recommended by American Council on Gift Annuities.

If you would like to learn more, please contact:  
Jarrett S. Stull  
740-376-4446  
email: jarrett.stull@marietta.edu  
Please visit:  
giftplanning.marietta.edu/CGA



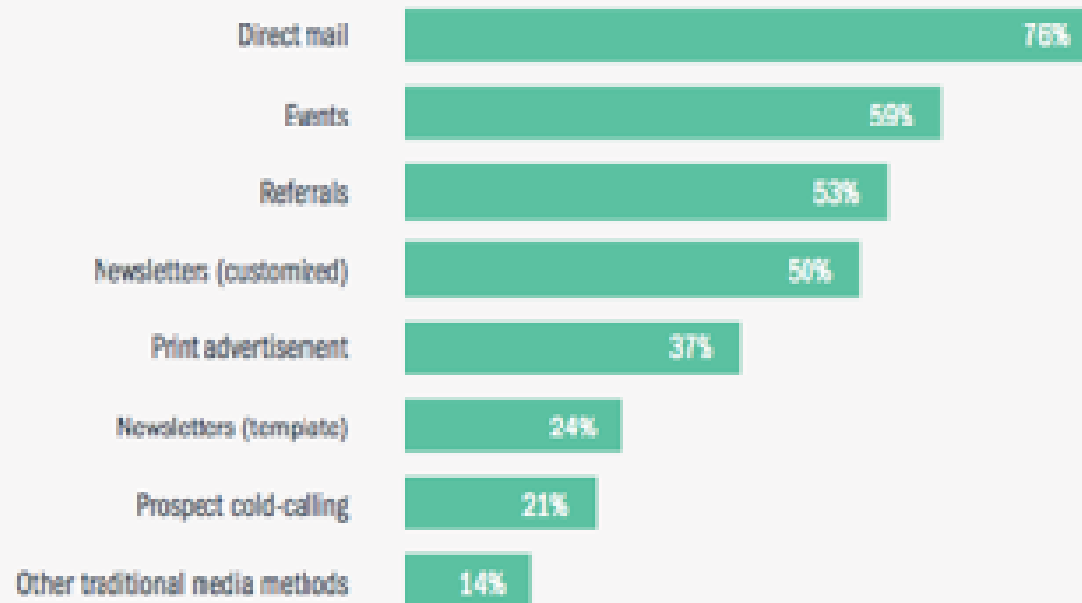
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Office of Advancement  
215 Fifth Street, Marietta, OH 45750-4004

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# Chronicle of Philanthropy Survey

## TRADITIONAL METHODS TO SEEK PLANNED GIFTS



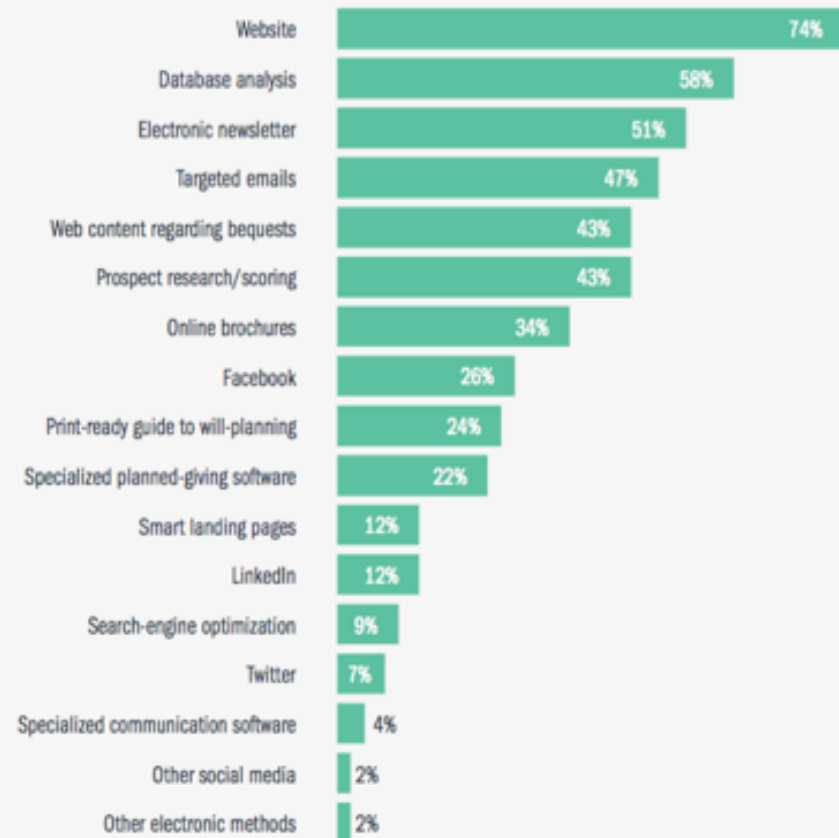
Number one tactic: 76% use Direct Mail



# Digital

Number one Digital tactic:  
74% use a Website

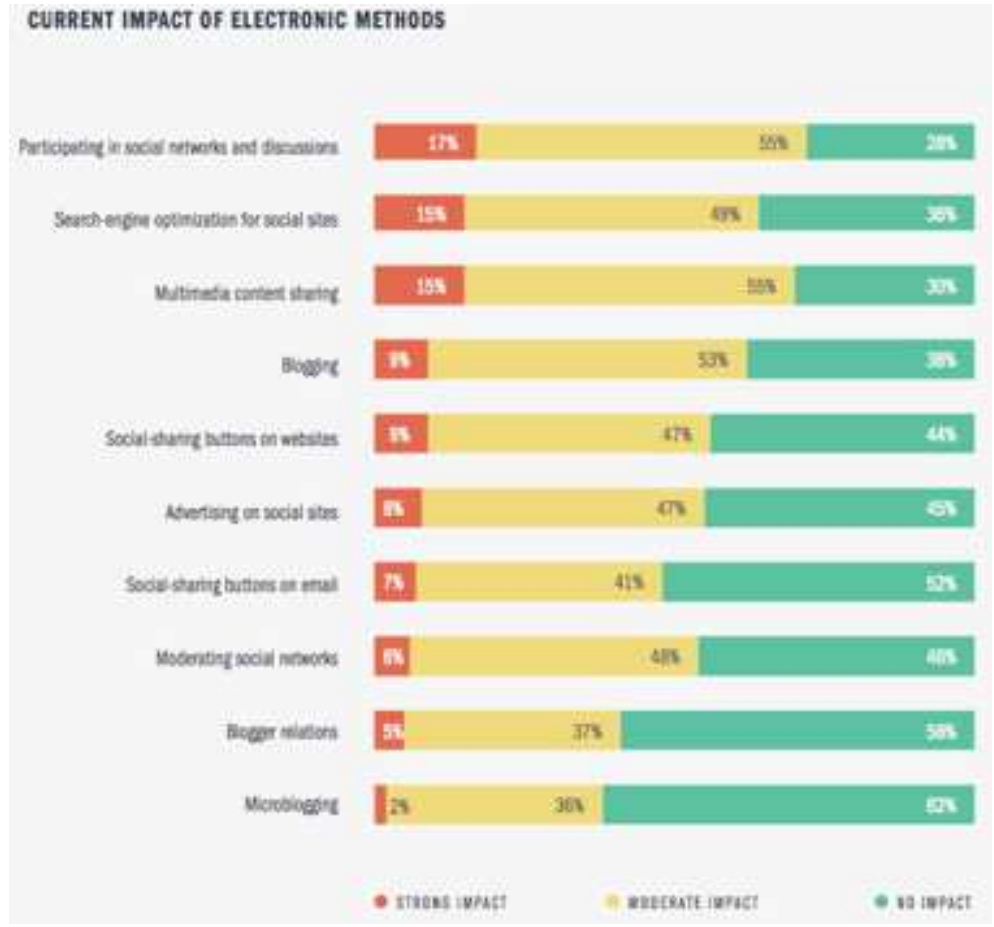
## ELECTRONIC METHODS TO SEEK PLANNED GIFTS





# Social

Only 17% find Social to have a strong impact





# Face-to-Face Personal Cultivation

- Although it may start through direct mail or your website
- Nothing better than making a genuine connection with the donor.
- Everything we have discussed leads to this.







# Conclusion

*“Our job is to connect to people, to interact with them in a way that leaves them better than we found them, more able to get where they’d like to go.”*

~ Seth Godin



# Don't Be Afraid to Ask

*“Would you consider making a gift to [Charity] in your will?”*

*“Many of our donors [strong supporters like you] have made a gift to [Charity] in their will. Is that something you might be interested in doing?”*





# Questions?





## Still Have a Question?

**Contact:** Andrew Palmer,  
Director of Marketing Services

**E-mail:** [apalmer@pgcalc.com](mailto:apalmer@pgcalc.com)