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IN PLANNED  
GIVING  
SUCCESS



# Marketing Testamentary Transfers

**Date:** July 28, 2022

**Time:** 1:00 pm – 2:30 pm EDT

**Presenters:** Carmen Tordiglione  
Sam Samuels



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## Take Away

### Steady Drumbeat

- Planned gifts are NOT like annual gifts
- Not often the result of one solicitation
- Steady, consistent, persistent communication over a period of years – or a lifetime



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# #1: Annual Fund Reply Slip/Online Giving Forms

- Paper slips
- Online gift form
- Special appeals
  - #GivingTuesday
  - Department/division

Renew my support with a gift of:

\$500    \$250    \$100  
 \$ \_\_\_\_\_

Ms. Jane Q. Sample  
TF Dean's Appeal FY21  
Tufts Fund for AS&E  
80 George Street, Suite 300-5  
Medford, MA 02155-5519

Email: [tuftsfund@tufts.edu](mailto:tuftsfund@tufts.edu)  
Phone: (617) 627-4930

*Thank you for making any necessary corrections in your information.*  
000000   000000   E2388

**Designate to:**

Financial Aid (Your gift will be matched!)  
 Area of Greatest Need  
 Unexpected Hardship Fund  
 Other \_\_\_\_\_

**Payment method:**

Check (Payable to Trustees of Tufts College)  
 Credit card  
Card number \_\_\_\_\_  
Expiration date \_\_\_\_\_  
Name on card \_\_\_\_\_  
Or, give online at [go.tufts.edu/givetoday](http://go.tufts.edu/givetoday)

**Gift Planning (check all that apply)**

I have already included Tufts in my will.  
 I am considering including Tufts in my will.  
 I am interested in gifts that provide income for life.

**A recurring gift:**

Please charge my card \$\_\_\_\_\_ each month.  
Starting month \_\_\_\_\_

\*Tufts' fiscal year runs from July 1 to June 30. This authorization can be canceled at any time by notifying us.

11-E2388

## #2: Ads in Publications

- Far Reaching
  - Embedded in a publication your constituents are likely already reading
- Flexible
  - Donor profiles
  - Ads on certain giving vehicles
  - Repurpose stories
- Steady Drumbeat
  - Unlike annual gifts, planned gifts may take many years of consistent, repetitive messaging - ads deliver that



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# Ad Examples

The Grécourt Society at 25

## Celebrating a Quarter Century of Generosity

*The Grécourt Society honors alumnae and friends who leave Smith bequests and other forms of planned and estate gifts*

The year 2019 marks a landmark in Smith's history: the 25th anniversary of the founding of The Grécourt Society.

"An alumna once said to me, 'The Grécourt Society— isn't that for rich people?'" said Sam Samuels, Smith's director of gift planning. "Not so. The society welcomes all alumnae and friends who have named Smith as a beneficiary of their will or made some other form of planned gift, regardless of size. I am awed on a daily basis by the generosity of alumnae who make these gifts, from the very wealthy to those of more modest means."

Smith has a long tradition of planned gifts that far precedes The Grécourt Society. The college itself was founded by the bequest of Sophia Smith. Finalized in 1870, Sophia's last will and testament was a stirring and prescient manifesto, a blueprint for women's education that remains relevant today.

"I hereby make the following provisions for the establishment and maintenance of an Institution for the higher education of young women, with the design to furnish for my own sex means and facilities for education equal to those which are afforded now in our Colleges to young men. ... It is my opinion that by the education of women, what are called their 'wrongs' will be redressed, their waxes adjusted, their weight of influence in reforming the evils of society will be greatly increased, as teachers, as writers, as mothers, as members of society, their power for good will be incalculably enlarged."

Many alumnae and friends have followed in Sophia's footsteps and given to Smith through their estate plans. In 1994, the college formally recognized this type of philanthropy by forming The Grécourt Society.



### WHO BELONGS TO THE GRÉCOURT SOCIETY?

WHEN YOU SEE a fellow alumna wearing a distinctive pin depicting the Grécourt Gates in gold against a blue background, she's one of the 2,225 living Grécourt Society members. The society also honors the 1,199 members no longer living, whose gifts have now come to Smith to create their legacies. Their impact is profound. Over these first 25 years, Grécourt Society gifts have contributed approximately \$460 million for scholarships, professorships, buildings, general operations and many other purposes: an astonishing collective expression of support.

### FIVE THINGS MADE POSSIBLE AT SMITH BY THE GRÉCOURT SOCIETY

- 1 THE CAMPUS CENTER CAFE.** Culinary superstar Julia McWilliams Child '34 left her Cambridge house to Smith College. The proceeds went to the Campus Center Café, serving delicious locally sourced meals.
- 2 THE SHERRERD CENTER FOR TEACHING AND LEARNING.** This vital center, a resource for faculty to hone their teaching skills, was endowed through a bequest from Kathleen Compton Sherrerd '54 and John J. F. Sherrerd.
- 3 THE SCHACHT CENTER FOR HEALTH AND WELLNESS.** Replacing the old infirmary, the Schacht Center was dedicated in 2015 and named in recognition of the bequest intention of Nancy Godfrey Schacht '56 and Henry Schacht.
- 4 THE NANCY KRUIDENIER SHEPARD '41 SCHOLARSHIP FUND.** Shepard established a charitable gift annuity that provided her income during her lifetime, then endowed this scholarship in her name. Grateful awardee Abigail Shrader '13 is pictured here.
- 5 NELSON LIBRARY RENOVATION.** Eleanor Burton '47 left Smith a substantial unrestricted bequest. The college put some of this toward the renovation of Nelson. The ground floor lobby will be named in Burton's honor.



Grécourt Society chair Pamela Smith Henrickson '62 says, "When an alumna joins The Grécourt Society and makes a deferred gift, she not only benefits the college, but often benefits herself as well." For example, you can:

- Name Smith as beneficiary of your will or trust and reduce your taxable estate.
- Establish a charitable gift annuity or charitable remainder trust, giving you a lifetime of income and a tax deduction.
- Donate your home to Smith and retain the right to live in it. This provides a substantial tax deduction and a meaningful future gift to Smith, without changing your lifestyle.
- Many of these gifts can be counted toward class Reunion totals.

### ONE SIMPLE WAY TO JOIN GRÉCOURT

Many Grécourt Society members have named Smith as a beneficiary of an IRA or other retirement plan. This requires no lawyers and can save significant taxes. For example:



THE GRÉCOURT SOCIETY: Your Legacy to Future Generations of Smith Women  
OFFICE OF GIFT PLANNING - SMITH.PLANNEDGIVING.ORG - GIFT.PLANNING@SMITH.EDU - (800) 243.2056, OPT 1016





## A Gift—and Sage Words—to Students

When Betsy Hitchcock '77 called the Gift Planning Office in September of 2018, it was a bittersweet conversation. Sweet because Betsy wanted to leave Smith a substantial bequest to endow a scholarship. Bitter because Betsy knew the bequest would come within about a year. She'd been diagnosed with a terminal condition, which moved her to consider her legacy to Smith.

You may not have known Betsy, but you've probably seen her work. An art major at Smith, she built a career as a talented graphic artist. She designed branding and packaging for many familiar products, specializing in natural foods that squared with her values.

That whimsical cow jumping over the moon depicted on every carton of Horizon Organic milk or yogurt? The package was Betsy's creation. The jar of Frontier Spices at the food coop, with its signature green label? That was Betsy's design, too. Ever feed your child or grandchild a spoonful of Earth's Best organic baby food, with memorable labels featuring drawings of diapered babies tending to their gardens? Betsy again, along with several iconic Celestial Seasonings tea designs.

On August 23, 2019, at the age of 63, Betsy passed away in her beloved home city of Boulder, Colorado. Her legacy to Smith was in two parts. A few months after the phone call, she made a gift to create the Betsy Hitchcock 1977 Endowed Scholarship, which will support Smith students with financial need every year in perpetuity. Also, she named Smith as a beneficiary of her estate, which increased the fund several fold. By doing it in two stages, she had the pleasure of seeing her gift award just one scholarship during her lifetime.

Betsy left more than money to Smith students. She also left a letter, written in her last weeks, which will be sent to every student awarded her scholarship. We publish that letter here, so that not only the Hitchcock scholars but every Smithie can read her thoughts. With gratitude.

### *Dear Student,*

I'd like to give you some heartfelt advice about how to maximize your Smith experiences. Take it all in and welcome the ups and downs of exploring academic life, social challenges and even your own emerging identity. Say yes to experimenting and risk. You are surrounded by faculty experts whose full-time job is to nourish your mind and inspire you. Don't limit yourself by who you were in high school or by premature expectations of your future career. You are in a safe place where you can reimagine your future. You are surrounded by bright students—there is a connection and abundance of potential friends so numerous you won't get to know them all. Find and forge diverse relationships that might last a lifetime. At least once in your time at Smith take a rowboat out on the pond at dusk; adopt a favorite plant or building. Mine is the "Fagus grandifolia" (American beech tree) between the library and plant house. Attend your reunions to appreciate all the diverse lives and lifestyles of your classmates.

Many people say their college years were some of the best years of their life. I hope this will be true for you. It was true for me.

I write this letter from a chair in my house, in Colorado's Rocky Mountains. It is a lovely perch from which I can observe nature and have comfort at the end of my life. My time at Smith gave me intellectual self-esteem and a modest confidence in my own voice. While nurturing my independence, it also offered me a connection with a sisterhood of women friends. Whatever you gain from Smith, I hope it enhances your joy in life, your love of knowledge and learning and your connection and empathy for others. We'll never meet but please know I am rooting for your success and hope that you will live your fullest destiny in this world.

Often, unique to our college years, we say yes to learning, to ourselves and to risks. Don't let that slip away as loyalty and responsibilities to friends, partners, family and motherhood accumulates. Be sure to remember the yes to self as we merge into a society that can't seem to take no for an answer in terms of what it will take.

Your mark, in the end, will be measured by where and what you have loved. Smith is certain to be part of that.

*Betsy R. Hitchcock*  
CLASS OF '77



Betsy Hitchcock '77  
October 27, 1955–August 23, 2019





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# Ad Examples

## “My planned gift helps me support the Tufts mission of patient-centered care.”

Dr. Robin Dretler, M78, A06P, began his personal tradition of giving back to Tufts not long after his own graduation: “A scholarship helped me a great deal, so as soon as I started my practice, I began giving back the amount of that scholarship every year.” To celebrate his 40th TUSM reunion, he and his wife, Muffie, created an endowed scholarship for the medical school. A gift in their estate plans will add to their fund in the future.



The best part of his Tufts education, says Dr. Dretler, was a strong focus on the patient, beginning with a thorough patient history and exam. “I still emphasize this to my residents. It all starts with the patient.” Now a leading specialist in infectious disease in Atlanta, Georgia, Dr. Dretler has been voted “Top Doctor” in his field by *U.S. News & World Report* and *Atlanta Magazine* annually for the past 10 years.

Advances in medicine and technology are bringing tremendous benefits to patients and doctors, says Dr. Dretler, but when it comes to excellent care, nothing is more important than “that personal connection and commitment to the people in our care.” Through their lifetime support and the additional gift in their estate plan, Dr. Dretler and Ms. Michaelson are proud to extend the Tufts tradition of compassionate, patient-centered medicine to a new generation of physicians.



Katya Tsaion, NG99

“I feel so privileged to be part of the Friedman School. I included the school in my will to give back to a place that transformed my life and to make sure that others have the same opportunity.”

### Your Gift. Lasting Difference.

You, too, can include the Friedman School or HNRCA in your estate plan by:

- Giving a specific dollar amount or percentage of your estate through your will or trust
- Leaving a specific asset, such as stock or real estate
- Designating Tufts as a sole or partial beneficiary of a 401(k), IRA, or other retirement plan
- Naming Tufts as a beneficiary of a life insurance policy
- Recommending Tufts as a successor beneficiary of a donor advised fund



## A GIFT FOR ALL SEASONS



### CHARITABLE GIFT ANNUITY RATES\*

AGE	RATE
70	5.6%
75	6.2%
80	7.3%
85	8.3%
90+	9.5%

\*Exact benefits will vary depending on timing of gift and number and ages of beneficiaries.

### CHARITABLE GIFT ANNUITY

You can make a gift that offers quarterly income for life and supports Tufts in the future. Benefits include:

- Fixed payments for you and/or a loved one
- Flexibility to choose when payments begin
- The potential for tax-free income
- Tax savings, including an income tax deduction and a possible reduction in capital gains tax
- A meaningful way to support the area of Tufts that is important to you



For more information on making a planned gift, please contact Tufts Gift Planning Office: 888.748.8387 giftplanning@tufts.edu • tufts.edu/giftplanning



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For more information, contact the Gift Planning Office. (888)-748-8387 • giftplanning@tufts.edu • tufts.edu/giftplanning

## #3: Email

TRAVEL  
PLANSNEW TAX  
LAWS

NEW HOME



MARRIAGE

NEW ADDITION  
TO THE FAMILY

RETIREMENT

THERE ARE MANY REASONS  
TO UPDATE YOUR ESTATE PLAN.

If now's the time to create or update your estate plan, let us help. Our free [estate planning organizer](#) will help you compile your information, define your intentions, and make plans to support the people and organizations that mean the most to you.

Call or email us for your free estate planning organizer, or download it at [go.tufts.edu/organizer](https://go.tufts.edu/organizer).

If you would like to include a bequest to the **School of Medicine** in your plans, the Gift Planning Office is pleased to assist you. Or, if you have already done so, contact us so that we can say thank you and welcome you into the Charles Tufts Society.

Call: 888.748.8387

Email: [giftplanning@tufts.edu](mailto:giftplanning@tufts.edu)

Visit: [go.tufts.edu/giftplanning](https://go.tufts.edu/giftplanning)

- Excellent follow-up to a paper mailing
- Cost-effective
- Easier to link to website or reply email
- Drive traffic to your website

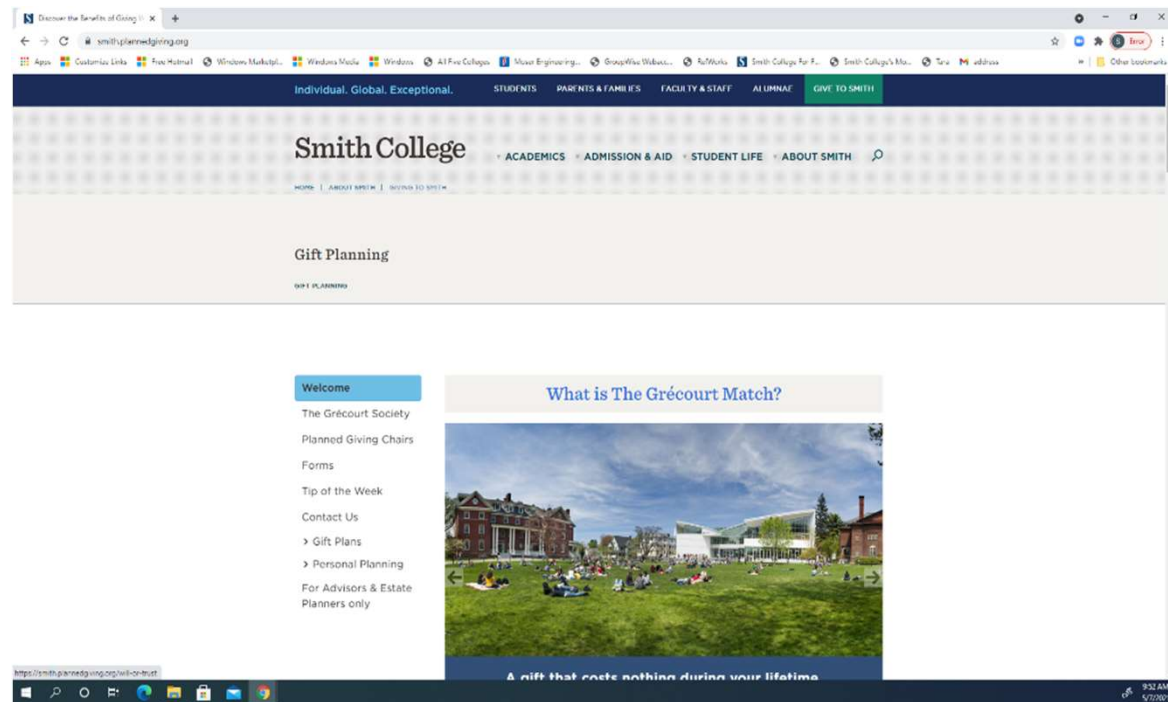




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## #4: Website

- Linkable from emails
- Deep source of information
- Home grown or outsourced



## #5: Postcards

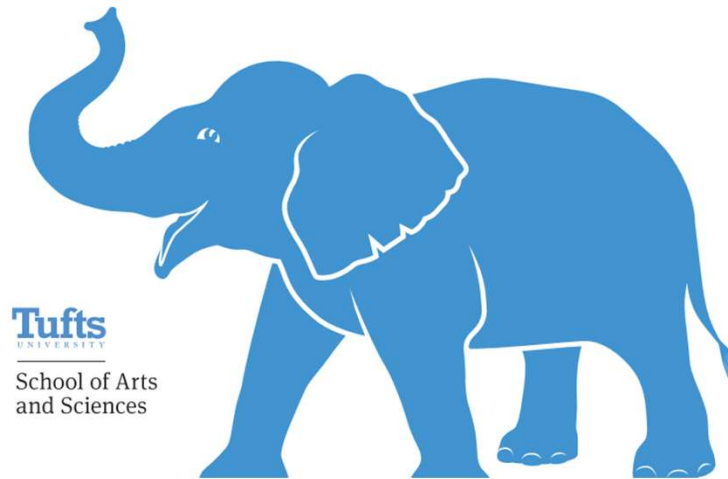
Jumbos, raise your trunk if ...

### Pros

- Simple
- Quick
- Cost-effective

### Cons

- No reply device



... you included the School of Arts and Sciences in your future plans.

**Let us know.** We want to say **thank you** for your support and welcome you into the Charles Tufts Society. This society celebrates those who have included a gift in their estate plan, such as through a:

- Will or living trust
- 401(k), IRA, or other retirement plan
- Life insurance policy
- Donor advised fund successor beneficiary
- Charitable remainder trust

Members are invited to special events and can choose to be recognized or remain anonymous. Their thoughtful planning provides critical future support to every aspect of the school, including excellence in teaching, groundbreaking research, and life-changing financial aid.

OR

... you want to support the future of the School of Arts and Sciences.

The Gift Planning Office can help you **explore different options** from bequests to gifts that provide income in return.

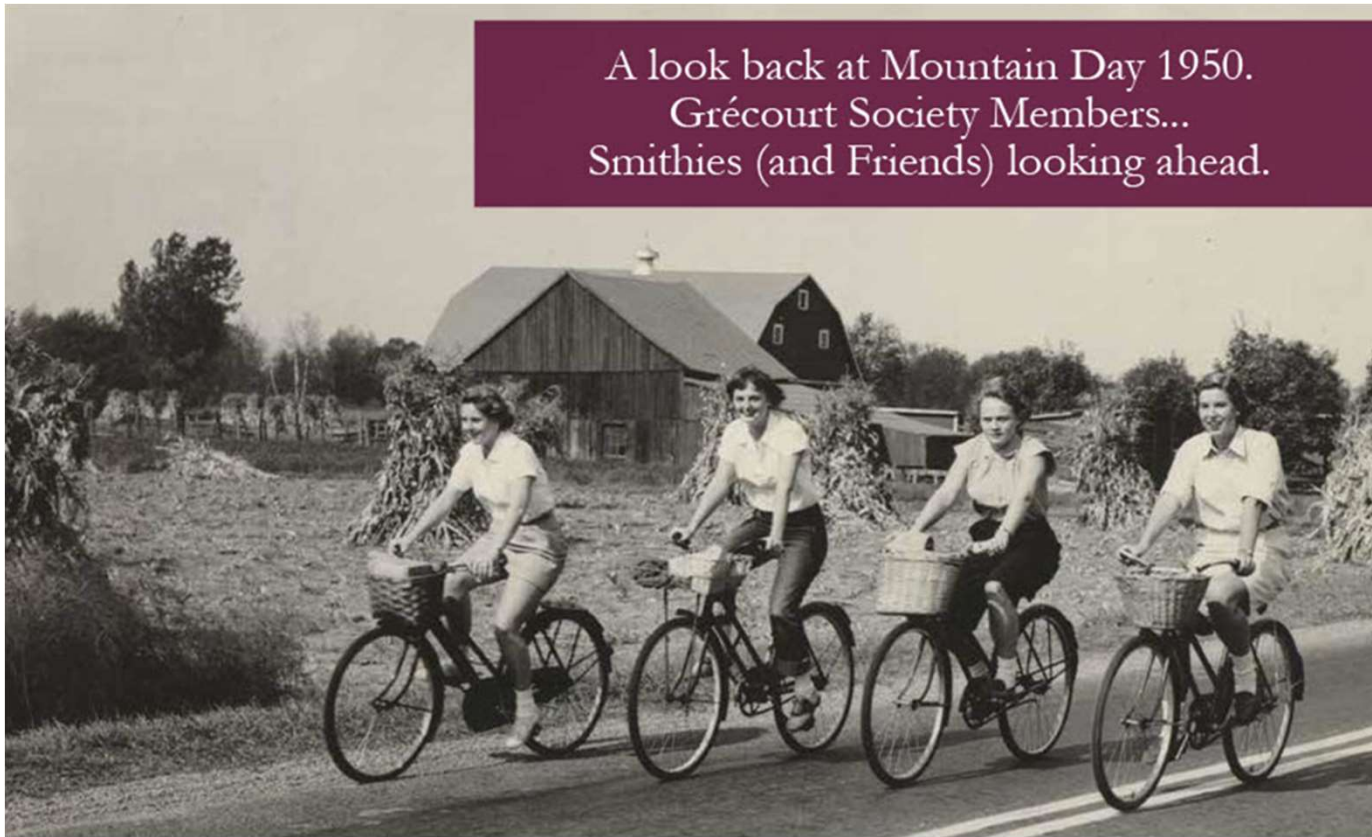
  
The CHARLES TUFTS Society

Contact us:  
888-748-8387 | [giftplanning@tufts.edu](mailto:giftplanning@tufts.edu)  
[go.tufts.edu/legacysociety](http://go.tufts.edu/legacysociety)

TUFTS UNIVERSITY  
GIFT PLANNING OFFICE  
80 GEORGE STREET, THIRD FLOOR  
MEDFORD, MA 02155

# Postcards

A look back at Mountain Day 1950.  
Grécourt Society Members...  
Smithies (and Friends) looking ahead.



## #6: Direct Mail

Reports on paper's death are grossly exaggerated.

### Pros of paper

- Trackable
- More eyeball time
- Durable
- Flexible

“I tucked it away.”

- Newest CGA donor





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# Direct Mail Examples

## A Legacy for Tufts Athletics



### Make a Planned Gift to Help Our Future Jumbos Continue to Excel!

The Tufts Department of Athletics plays a significant role in the mission of the university to provide a transformative experience for our students. Jumbo student-athletes pursue and achieve excellence on our fields, courts, and ice, as well as in our classrooms, laboratories, and greater Medford/Somerville communities. Athletics help Tufts' men and women become well-rounded, engaged students with the discipline and motivation to become leaders in their professions and society when they graduate.

I witness what it means to be a Jumbo daily, and I am humbled by the generosity of alumni and friends, like you, who embody that same spirit through your philanthropy, which provides vital support to our varsity, club, and intramural programs. There are so many ways you can support Jumbo athletics. From including the university in your will or naming it as a beneficiary of a retirement account to establishing a gift that provides you income for life, you can help our future Jumbos experience the joy and personal growth inherent in athletics participation.

Thank you for taking a few moments to discover how you can support Tufts Athletics and achieve your personal financial, tax, and estate planning objectives through the many gift planning options Tufts offers.

Excellence is Brown & Blue—Go Jumbos!

**John Morris**  
Director of Athletics

### WAYS TO SUPPORT TUFTS ATHLETICS THROUGH A PLANNED GIFT

**A gift in your estate plan.** You can create a bequest in your estate plans by designating a specific dollar amount or a percentage of your assets to support Tufts Athletics. This gift may offer future tax savings, will not affect your current cash flow, and is generally revocable. Common types of estate gifts include:

- A gift by will or revocable/living trust, established when you create or update your plans

Sample wording: "I give the sum of \_\_\_\_\_ dollars (\$\_\_\_\_\_) OR \_\_\_\_\_ percent (\_\_\_\_%) to Trustees of Tufts College, of Medford, Massachusetts, for the general purpose and use of Tufts Athletics."



## A Gift of Real Estate Funds Groundbreaking Neuroscience Research

Ghahreman Khodadad, MD, spent 16 years seeking a research institution interested in and equipped to investigate extreme selfishness. In 2019, the retired neurosurgeon found a partner in Tufts University School of Medicine and established the Ghahreman Khodadad Center for the Study of Excessive Pathological Selfishness, which will explore the neurological basis of self-centeredness and contrasting traits like altruism.

When Khodadad purchased two Cincinnati-area farms more than 30 years ago, he couldn't have foreseen using them to make a gift. The properties had appreciated significantly, and if he sold them, he would have paid a hefty capital gains tax bill. In giving them to Tufts, Khodadad shared, "I wanted to put the full value of the sale of the farms to better use." He also named Tufts as a beneficiary of retirement assets, further supporting the science that he hopes will lead to a kinder, more compassionate world.

### TAX SNAPSHOT: SECURE ACT

#### How has the SECURE Act changed retirement and estate planning?

- **RMD Age Raised:** If you were born on July 1, 1949, or later, you will not be required to take a required minimum distribution (RMD) until age 72. (The CARES Act, passed after the SECURE Act, suspended RMDs for 2020.)
- **Age Limitation Rules Repealed:** If you have earned income, you may now contribute to a traditional IRA regardless of your age.
- **"Stretch" IRA Eliminated:** Most non-spouses who inherit an IRA must withdraw all funds from an inherited IRA within 10 years (previously, distributions could be "stretched" over the beneficiary's life expectancy). A possible solution to providing lifetime income to heirs is a charitable remainder trust.

### Gifts anyone can make:

## ESTATE PLANS AND BEQUESTS

By including Harvard Business School in your estate plan, you can have a lasting impact on the School's ability to fulfill its mission.

### Bequests/Estate Provisions

You can include HBS in a bequest or estate provision in several ways:

- Give a specific dollar amount or a percentage of your estate
- Give stocks, bonds, real estate, or other property
- Name HBS as a residual beneficiary so that the School receives a bequest after all other bequests have been satisfied and final taxes paid

### Beneficiary Designations

You can name HBS as the sole or a partial beneficiary of a retirement plan—such as a 401(k) or IRA—or a life-insurance policy. Or you can designate the School as the successor beneficiary of your donor-advised fund.

### Make an Impact

Your gift can be directed to wherever it is needed most. Unrestricted gifts provide HBS with the flexibility to address core priorities and harness new ideas. Or you can designate your gift for a specific purpose, such as student financial aid, curriculum innovation, or faculty research. Contact the Office of Planned Giving or visit our website for suggested bequest language.

### Benefits

- **Create a lasting legacy**  
By remembering the School in your estate plan, you will help HBS educate future leaders who make a difference in the world.
- **Achieve personal planning goals**  
Including HBS in your estate plan can help you fulfill your financial, tax, and estate planning goals.
- **Boost your class giving totals**  
If you are in your 50th reunion or later, your class and section can receive credit for the estimated amount of your bequest or estate provision.



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# Direct Mail Examples

SMITH COLLEGE Gift Annuity Inquiry Form

SMITH COLLEGE Gift Annuity Inquiry Form

Contact us to learn more about how you can help change the future of Smith College and to request a complimentary, no-obligation illustration to show what your payments might be.

Name/Class: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
Address: \_\_\_\_\_  
Email: \_\_\_\_\_  
Phone: \_\_\_\_\_ Best way to contact me: \_\_\_\_\_

Annuity Amount: \$ \_\_\_\_\_ (\$10,000 required minimum.)  
Funding asset would be:  Cash  Stocks/Securities (cost basis, if known \$ \_\_\_\_\_)  
Annuity type:  Immediate Payments  Deferred Payments (must be at least 12 months)  
If deferred, date I would like to begin receiving payments: \_\_\_\_\_  
I'd like an illustration for a  one-life or  two-life annuity.  
If two-life, secondary annuitant:  
Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
Relationship: \_\_\_\_\_

Contact us to learn more about how you can help change the future of Smith College and to request a complimentary, no-obligation illustration to show what your payments might be.

Name/Class: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
Address: \_\_\_\_\_  
Email: \_\_\_\_\_  
Phone: \_\_\_\_\_ Best way to contact me: \_\_\_\_\_

Annuity Amount: \$ \_\_\_\_\_ (\$10,000 required minimum.)  
Funding asset would be:  Cash  Stocks/Securities (cost basis, if known \$ \_\_\_\_\_)  
Annuity type:  Deferred Payment Charitable Gift Annuity  
Date I would like to begin receiving payments (must be at least 12 months): \_\_\_\_\_  
I'd like an illustration for a  one-life or  two-life annuity.  
If two-life, secondary annuitant:  
Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
Relationship: \_\_\_\_\_

Can't decide on when you'd like to start receiving your payments? Contact us for information about a flexible deferred payment annuity.

6/201

## GUARANTEED PAYMENT. IMMEDIATE IMPACT.

How? Your gift annuity will qualify for The Grécourt Match! 10% of your gift will be matched for immediate financial aid (up to a limit of \$10,000.)

Office of Gift Planning | [smithplannedgiving.org/charitable-gift-annuity](http://smithplannedgiving.org/charitable-gift-annuity)  
[gift\\_planning@emith.edu](mailto:gift_planning@emith.edu) | (800) 241-2056, option 5



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Office of Gift Planning | [smithplannedgiving.org/deferred-gift-annuity](http://smithplannedgiving.org/deferred-gift-annuity)  
[gift\\_planning@emith.edu](mailto:gift_planning@emith.edu) | (800) 241-2056, option 5



A guaranteed paycheck for life?  
What's not to like?

Susan Thoresen '66



A guaranteed paycheck for life?  
What's not to like?

Melissa Buttarò '96



## #7a: Legacy Challenges – Dollar Goal

### “A Match”

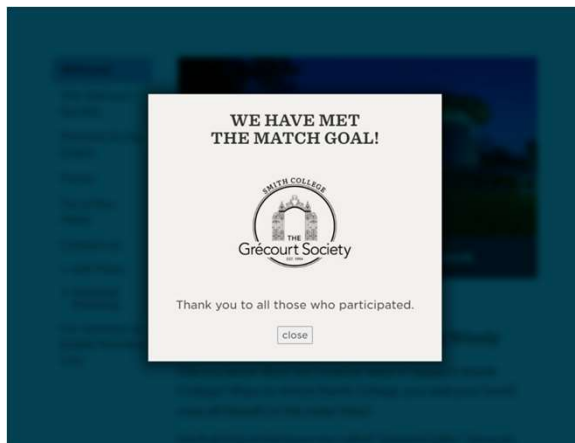
- Use a significant current gift to leverage planned gifts
- Talk with your next donor who gives an outright principal gift
- “Match” that gift at some discounted % with planned gifts
- Planned giving donors can be motivated by “impact now, impact later” benefit
- Set your criteria: % to be matched, cap on each match, etc.

Promote, promote, promote!



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# Legacy Challenge



## The Grécourt Society:

Your Legacy to Future Generations of Smith Women

Office of Gift Planning | [smith.plannedgiving.org](http://smith.plannedgiving.org)  
[giftplanning@smith.edu](mailto:giftplanning@smith.edu) | (800) 241-2056, option 5



SMITH COLLEGE  
Office of Gift Planning  
33 Elm Street  
Northampton, MA 01063





## #7b: Legacy Challenges – People Goal

New Charles Tufts  
Society Members  
during the campaign

- Easy
  - To create
  - To talk about
- Age inclusive
- PG voice at the table in high-profile meetings
- Extends Planned Giving Office's reach



772/1,000

Promote, promote, promote!



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## #8: Development Officer Partnerships/Training

Major, Principal and Annual Fund Officers

- Extend the reach of the Planned Giving Office
- Serve as the eyes and ears on the road
- Have built trust with their donors
- Motivated to close gifts – share credit
- Develop clear protocols for who communicates with prospects

## #8: Development Officer Partnerships/Training

**Yesterday, Today, Tomorrow:  
The Time for IRA Gifts is Now**



Virtual or in-person

**Property to Possibility**



Two Flavors of  
Training

Full-size workshops  
Mini-workshops

**Assets that Go Bump in the Night**



Marketing workshops to Development  
Offices is similar to marketing planned  
gifts to donors

## #9: Webinar

- Offer to lead webinars
- Work with constituencies or subgroups
  - Higher ed – classes and class clusters
  - Special groups
    - Boards, member groups, etc.
- Can be broad or specific topics
  - “Estate Planning 101” vs. “A Deep Dive into Annuities”



## #10: Peer-to-Peer Solicitations

- Volunteer network can include planned giving volunteers
- In education, can have class-based education structure
- Call upon volunteers as ambassadors
- Volunteers can:
  - Raise awareness in class newsletters (or equivalent for non-education)
  - Be signers in letter campaigns
  - Spread awareness through informal channels

## #11: Surveys

- PG Calc published white paper in Spring 2021:
  - Called Donor Surveys the “Foremost Planned Giving Lead Generation Technique”
- Well-designed survey includes perhaps half-dozen questions, of which only one or two deal directly with planned giving
- Ask meaningful questions that get at what is important to donors
- Bring to mind memories
- Emphasize lasting impact
- Be sure survey works on computer, tablet or phone

## #11: Surveys - Case study, questions

Liberal Arts College asked the following survey questions of 8,181 alumni:

1. Was there a person who inspired you to come to \_\_\_\_\_?
2. Many alumni, faculty, parents, and friends have chosen to make a future gift to the college that will allow future generations of students to benefit from the \_\_\_\_\_ experience. Would you consider a future gift in your estate plans (retirement account, will, trust, etc.)?
3. What do you think is most important to the future of the college?
4. Would you consider a gift guaranteed by \_\_\_\_\_ that would provide you with annual payments for life?
5. What stands out most to you about your \_\_\_\_\_ experience?



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## #11: Surveys - Case Study, results

- 2,228 responded (27% response rate)
- 70 became legacy society members
- 45 expressed interest in making a bequest
- 62 expressed interest in a life income gift
- 198 intend to make a bequest
- 5 intend to make a life income gift



## #12: Tracking Results

Bang for your buck!

- Define success
- Ask questions
  - Is there a certain format that resonates?
  - Are there certain times of year that produce better results?
  - If you did A/B testing, did a subject line perform better than another?
- Admit success (and failure)

## #12: Tracking Results

- Source coding
  - Tracks source (when known) of an inquiry
  - e.g.: direct mail, gift officer referral, etc.
  - Helps identify highest ROI activities

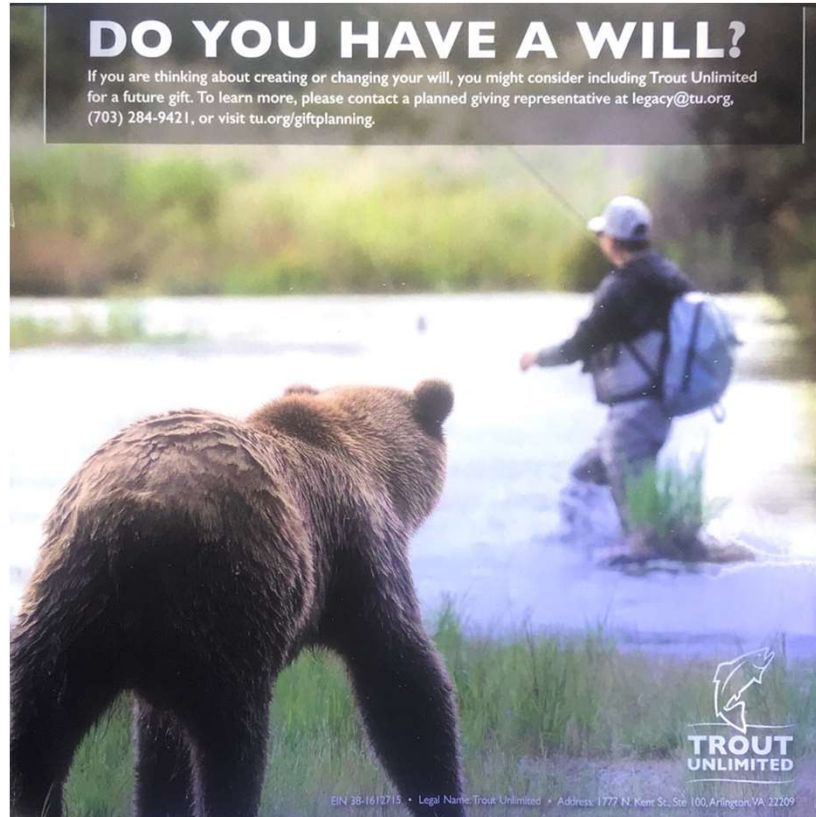


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## Have Fun and Be Creative!

### DO YOU HAVE A WILL?

If you are thinking about creating or changing your will, you might consider including Trout Unlimited for a future gift. To learn more, please contact a planned giving representative at [legacy@tu.org](mailto:legacy@tu.org), (703) 284-9421, or visit [tu.org/giftplanning](http://tu.org/giftplanning).





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Thank you!



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