



Marketing in the Age of Trump



Date: December 20, 2018

Time: 1:00 – 2:30 Eastern Time

Presenter: Andrew Palmer
Director of Marketing Services
PG Calc



I Am Asked All The Time...

What's new?





Same Old Stuff ...


- Visual website
- Don't overwhelm your audience
- Content marketing
- Social media
- Video
- Mobile marketing



Websites

BENNINGTON COLLEGE

PLANNED GIVING



Including Bennington College in your long-term financial or estate plans is one of the most effective—and important—philanthropic decisions you can make.

Bennington has always been defined by its forward-thinking approach to education, and our students have always been characterized by their passion for reshaping the world around them. With planned giving, you can design ways to have a lasting impact on Bennington College and empower our students now, and far into the future.

Whether it's as simple as adding a line to your will, or it entails a more involved arrangement that may offer substantial tax benefits while guaranteeing you or your loved ones an income stream, let the Office of Gift Planning help you and your financial advisors develop a gift plan that meets your financial and philanthropic goals.

TALK TO US
 Our Office of Planned Giving
 Call 802-440-4367

How the Tax Reform Act affects you and your charitable giving

"I have chosen to include Bennington in my estate plans because I want to support the leadership role that the College plays in higher education. The liberal arts in general, and Bennington's model in particular, are urgently important. This paradigm should and must continue for future generations. I hope you will consider a planned gift to Bennington. Your decision today can quite literally help change the future." —Alan Komberg, '74, Chairman, Board of Trustees

GETTING STARTED

THE IDEAL GIFT FOR YOU?


PLAN INTERNATIONAL

GET INVOLVED WHAT WE DO ABOUT US GIVE

PLANNED GIVING

Make a lasting impact on the lives of children, their families, and the communities where Plan works.

CREATE YOUR LEGACY



TALK TO US
 Our Office of Planned Giving
 Call 401-562-8454

Since 1937, generous donors like you have improved the lives of hundreds of thousands of children, their families, and communities through gifts to Plan International USA. But the work is far from done. By making a planned gift—either during your lifetime or at the end of life—you can ensure that we continue to achieve our mission of advancing children's rights and equality for girls worldwide in the years to come.

A planned gift can benefit both you and your heirs by:

- increasing your charitable impact.
- increasing the inheritance received by your heirs.
- increasing your current income.
- decreasing the amount you pay in taxes each year.

How the Tax Reform Act affects you and your charitable giving.

GETTING STARTED

MAKE A BEQUEST

DONOR STORIES



Keep Design Simple and Straightforward

- Audiences are seeking a return to honesty and simplicity
- Minimalism is the way forward
- An image with a clear and elegant purpose will prevail



Less is More...

AND POWERFUL



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

Education changes lives.

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

Learn how a charitable gift, like a bequest to Bennington in your will or making Bennington a beneficiary of your IRA, can match your personal legacy goals.

Start today by downloading our FREE Estate Planning Guide from our **new planned giving website** at plannedgiving.bennington.edu/guide.

The planning you do today could change the lives of Bennington College students tomorrow.

For further information, please contact:

Lauraine K. Goldberg
Senior Director of Planned Giving
Phone: 802-440-4367
Email: lgoldberg@bennington.edu





Direct Mail: Stand Out From the Crowd

- Large pieces command attention.
- Despite the significant postage savings from mailing smaller-sized pieces that fit USPS standards for automated processing, large direct mail gets a better response.
- Try Humor...



Grab Their Attention...



Higher Gift Annuity Rates Mean More Income For You



Summit Health
Development Office
785 5th Ave Ste 1
Chambersburg, PA 17301

If you're looking for ways to support Summit Health and receive a steady income stream, a Charitable Gift Annuity may be your answer.

A Charitable Gift Annuity is a simple contract between you and the Brooklyn College Foundation. In exchange for a gift of \$10,000 or more, Summit Health will provide guaranteed fixed payments for life. Summit Health subscribes to annuity rates recommended by the American Council on Gift Annuities which announced higher rates. Higher rates mean higher annual payments.

An example of a gift of \$10,000 for one annuitant:

Age	60	65	70	75	80	85
Rate prior to July 1	4.4%	4.7%	5.1%	5.8%	6.8%	7.8%
Rate after July 1	4.7%	5.1%	5.8%	6.2%	7.3%	8.3%

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 the American Council on Gift Annuities.

To learn more and calculate your personalized benefits, visit giftplanning.summithealth.org/cga.

For assistance, please contact:
Deborah J. Strong, CFRE, CSP
Director of Development
717-267-7457
dstrong@summithealth.org
giftplanning.summithealth.org/CGA



Use Video...

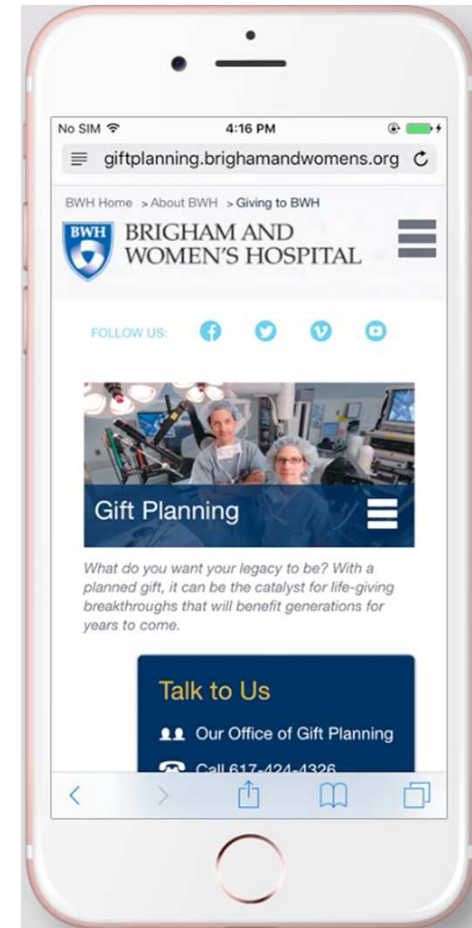
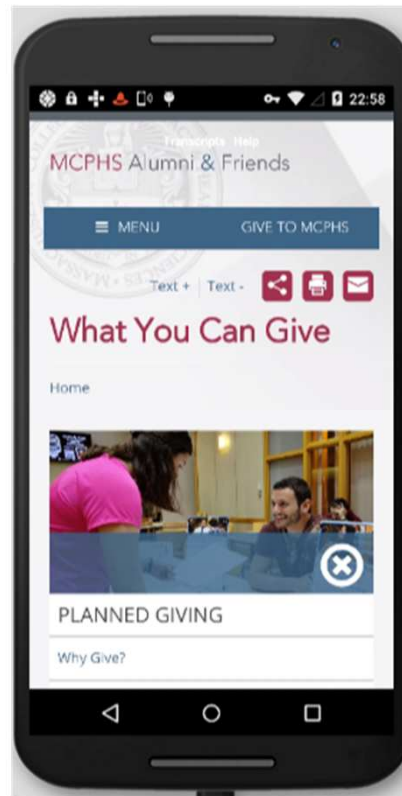
- Video of inspiring stories create great emotion
- Simple production with strong content

The screenshot shows a website page for the Harvard T.H. Chan School of Public Health. At the top, there is a navigation bar with a 'Giving' button and the school's logo. Below the navigation, there is a sidebar menu with options: 'Planned Giving' (highlighted), '1913 Society', 'Why Give?', 'How You Can Give', and 'Contact Us'. The main content area features the heading 'Establish a Lasting Legacy' and a sub-heading 'Talk to Us' with contact information: 'Our Office of Planned Giving' and 'Call 617 432-8071'. The text describes the school's mission and the benefits of planned giving. At the bottom, there is a video player titled 'Introduction to the 1913 Society - Dr. Timothy Johnson' showing a video of Dr. Timothy Johnson, Co-Chair of the 1913 Society.



Mobile ...

- Use of mobile awareness is growing every year.
- From 5% to 15% in the past 5 years.





Test Social Media

- Use impact stories
- Event tie-Ins (stewardship)
- Surveys
- Manage expectations





But This Is Not All New...

What about new campaigns for
planned giving?



ACGA Rate Increase

Marketing opportunity

- Website
- Newsletter
- Direct mail
- Email



You may be particularly interested in an opportunity to take advantage of the new higher gift annuity rates.

Why the increase in rates? Like many nonprofit organizations, F&M subscribes to gift annuity rates recommended by the American Council on Gift Annuities, which has recently announced higher gift annuity rates reflecting current market conditions.

The minimum gift for an F&M annuity is \$10,000. Cash and appreciated securities are customary funding assets. As an added benefit when you fund the gift with appreciated securities you also save on capital gains tax.

Age	60	65	70	75	80	85
Old Rate	4.4%	4.7%	5.1%	5.8%	6.8%	7.8%
New Rate	4.7%	5.1%	5.6%	6.2%	7.3%	8.3%
New Annual Payment	\$470	\$510	\$560	\$620	\$730	\$830



It's a Better Investment...

A GIFT THAT PAYS YOU BACK Rates are increasing July 1!

If you're looking for ways to support Lasell and receive a steady income stream, a Charitable Gift Annuity may be your answer.

A Charitable Gift Annuity is a simple contract between you and Lasell. In exchange for a gift of \$10,000 or more, Lasell will provide guaranteed fixed payments for life. Lasell subscribes to annuity rates recommended by the American Council on Gift Annuities which announced higher rates will go in effect July 1st. Higher rates mean higher annual payments.

Age	60	65	70	75	80	85
Rate prior to July 1	4.4%	4.7%	5.1%	5.8%	6.8%	7.8%
Rate after July 1	4.7%	5.1%	5.6%	6.2%	7.3%	8.3%

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.

To learn more and calculate your personalized benefits, visit plannedgiving.lasellalumni.org/CGA.

For more information contact:

Rebecca Brenner, Advancement Officer
617-243-2152, rbrenner@lasell.edu

Lasell College established the Lasell Heritage Society to thank the generous donors who support Lasell's future through a planned gift. We welcome members who support Lasell College through a gift by will, retirement plan, life income vehicle or other planned gift. Such a gift may be the perfect way for you to do more for Lasell than you thought possible.



1844 Commonwealth Avenue
Newton, MA 02466



HELP MAKE A DIFFERENCE



The New Tax Law and Charitable Giving

Fight misinformation

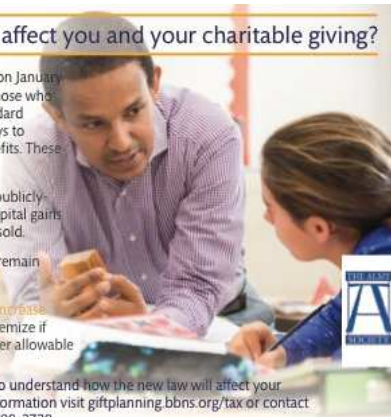
- Website
- Newsletter
- Direct mail
- Email

How will the new tax law affect you and your charitable giving?

While the tax reform act that took effect on January 1, 2018, limits charitable deductions to those who itemize rather than using the higher standard deduction, there are still a number of ways to make gifts to BB&N that provide tax benefits. These opportunities include:

- Gifts of appreciated property such as publicly-traded securities allow you to avoid capital gains tax on the appreciated asset if it were sold.
- Gifts using the charitable IRA rollover remain available to donors age 70 ½ or older.
- Consider using your lower tax rate to increase your giving, which may allow you to itemize if charitable gifts are combined with other allowable deductions.

Be sure to check with your own advisor to understand how the new law will affect your individual tax situation. For additional information visit giftplanning.bbns.org/tax or contact Janet Rosen at jrosen@bbns.org or 617-800-2729.



Tell Me More

MUNSON HEALTHCARE Foundations
1150 Medical Campus Dr., Traverse City, MI 49684

Nonprofit Org
US Postage
PAID
Traverse City MI
Permit #238

I would like information about:
 Lifetime gifts and tax benefits.
 Other ways I can include Munson Healthcare in my estate plan.

Name _____
 Address _____
 City, State _____ Zip _____
 Email _____
 Telephone _____

I prefer to be contacted by:
 Mail Phone Email



How will the new tax law affect you and your charitable giving?

The tax reform act that took effect on January 1, 2018, limits the benefit of charitable deductions for those changing from itemized to the standard deduction. However, you still will have ways to make lifetime gifts to charity and still receive tax benefits, including:

- Make gifts of appreciated property such as publicly-traded securities. Avoid capital gain tax by making a gift of appreciated assets that you have held for at least one year.
- Make gifts using the charitable IRA rollover. If you are over age 70½, make a direct transfer to charity from your traditional IRA. Such a transfer is not taxable and counts toward your required minimum distribution.
- Make larger gifts to charity. Combined with other deductions, a larger charitable gift may allow you to itemize; the resulting tax savings will reduce the effective cost of your gift.

If you would like to learn more, please visit: legacy.munsonhealthcare.org/tax-reform

Be sure to check with your own advisor to understand how the new law will affect your individual tax situation. Do not hesitate to contact:
 Office of Legacy Giving
 Phone: 231-935-6448
 Email: legacy@mhfc.net

MUNSON HEALTHCARE Foundations

This material is not offered in regard to tax advice. Individuals should seek the advice of their own legal counsel.

Your gift will change lives.

Our Legacy Society recognizes individuals who have included Munson Healthcare in their estate plans through a planned gift such as a will or trust, life insurance, charitable gift annuity, real estate, or charitable remainder trust.

When you let us know your intentions, we are able to thank you personally for your vision and generosity. In addition, others will be inspired to follow your leadership.

When you join the Legacy Society you will be invited to donor appreciation events and you will have the option of being listed in our newsletters and donor recognition walls.

BUSINESS REPLY MAIL
 PERMIT NO. 1000
MUNSON HEALTHCARE FOUNDATIONS
 1150 MEDICAL CAMPUS DRIVE
 TRAVERSE CITY MI 49684-2982



Anything Game Changing?

Radical?
Outside the box?

A new way of
thinking about
planned giving
marketing?



"Never, ever, think outside the box."



I Thought About It and then Asked Myself...

How did a business person with no political experience propel himself to upset one of the world's most-experienced politicians?



The Answer Is...

Marketing



Please Note:

This is an A**POLITICAL**
presentation





A Learning Moment...

As Marketer, this was GENIUS.

- ✓ Apply the new
- ✓ Reaffirm what we know but perhaps don't stress
- ✓ A shake up of your marketing might be a good thing

Disclaimer: We recognize much of the success is based on the use of social media, but since it does not apply to PG we will tread lightly.



1. Throw Rules Out of the Window

He broke every rule and norm!

- ✓ Don't settle for "this is what we always do"
- ✓ Ready... FIRE! ...Aim
- ✓ Test new ideas
- ✓ Is it time to re-think your marketing?



2. Consistency and Repetition is Key

- Stay in the news, and in people's thoughts.
- He had a constant flow of messages, combined with a real voice. (Plays into his audience, who believe he is being authentic.)
- Today people are looking for the humanity behind the content.
- ✓ **Constant cultivation**
- ✓ **Make sure your words or message don't sound robotic. This is an important way to connect with your audience.**



2. Lather, Rinse, Repeat #MAGA

- Don't underestimate the power of a good slogan, no matter how cheesy it is.
- Just Do It | Think Different | A Diamond is Forever | Got Milk?
- Repeating phrasing can be very effective:
 - ✓ We're gonna start winning!
 - ✓ The _____ is a disaster.
- Phrases, when repeated enough, become truth for people.



2. Use Repetition in Your Marketing

- The repetition and consistency of his message worked.
- ✓ Repeat similar phrases consistently throughout your website and marketing campaigns.
- ✓ Phrases serve the purpose of reinforcing an emotional belief

“Gift that pays you back”

“As simple as filling out a form”



3. Simple, Easy-to-Remember Content Resonates

- Stuck with a simple message from the beginning: #MAGA.
- Simplicity in speaking and tweeting in short bursts of easy-to-read text.
- No details but general statements.
- Website limited text above the fold. Clear calls to action line the top of the site, which means users don't have to search for what they're looking for.



3. Don't Overwhelm....

- Simplicity may seem unlikely for a presidential campaign, but his simple direct content had a better chance of reaching his target audience.
- ✓ Your messaging should provide a real solution for donors.
- ✓ Don't lose them in the noise of describing how it works.
- ✓ Focus instead on a simple narrative that's easy to understand.



4. Authenticity & Confidence Resonates

- In marketing, it is tremendously important to be authentic.
- Trump's authenticity stands behind the fact that he, at all times, had the courage to defend his radical measures, which he truly believes are necessary.
- No apologizing. Love him or hate him, he is a real person.

✓ **Is your marketing personal?**



4. Be a Human...

Please contact us anytime!

[Home](#)

Contact our Office of Planned Giving for information on gift strategies that can help you support Fenway School of Psychology and provide significant benefits to you and your family. We are here to help you night and day.



Dr. Edwin Price
(555) 555-5555
giftplanning@fenwayschoolpsy.org
Vice President for Advancement
Fenway School of Psychology

Send Us a Message

Name *

Preferred Telephone Number

- Home
- Office
- Cell

Email address

Questions and/or Comments *

*Required



4. Confidence is a Very Powerful Thing

- When Trump speaks, there is a great level of confidence behind his every word. No matter what statement he makes.
- It is evident that he truly means what he says, making his audience believe him, and trust him.
- ✓ Do your PGOs and MGOs have this confidence?
- ✓ Conviction in PG is a must. Training is the key.
- ✓ Create “brand ambassadors” who will spread your programs word and ideas. (Legacy Society)



5. Know Your Audience

- #MAGA struck a chord with millions.
- The target audience they loved it (and bought the hat)!
- He was NOT trying to expand his “market,” but to focus only on his voters and their pain points.
- Some found it extremely offensive... but it was not for them.
- The target audience loved it.



5. Send a Message the Audience Will Understand...

- You can't appeal to everyone.
- ✓ Target your messaging.
- ✓ If everyone is your potential donor, no one becomes your donor. Be very specific about who you are marketing to.
- ✓ Don't worry about excluding a majority of your donors. Instead, resonate deeply with your ideal donor.
- ✓ Make them feel like you're speaking directly to them.



5. He Knew the Pain Points...

- His voters see him as empathetic.
- ✓ When you can tell your audience what their problem is better than they can articulate it themselves, they'll be more ready to listen to your solution.
- ✓ People trust you and connect with you more when they feel like you understand what they're going through. That's empathy.



6. Emotion Over Facts (Storytelling)

- Humans are extremely susceptible to emotion.
- We base decisions on our emotions first and logic second.
- Primal: fear, anger, disgust, sadness, and happiness.
- Trump is not a policy wonk. He's a storyteller pushing peoples emotional buttons.
- Elicits fear, anger and disgust and then provides a narrative to fit those emotions in.



6. We Know This Already...

In Planned Giving we sell...

- ✓ **Your mission**
- ✓ **The impact of the gift**
- ✓ **The satisfaction of giving**

These benefits are more powerful than tax benefits.



6. Fear and Greed

“There are three great forces in the world: stupidity, fear and greed.”

~Albert Einstein



6. Fear Has Always Been a Marketing Tool

- Politicians sell themselves to voters by using scare tactics
- Cable news stations use fear to sell their programs
- Advocacy groups do the same to sell memberships
- Realtors use it to sell homes in gated communities

When frightened, we react viscerally and want to take action to protect ourselves and our communities.



Happiness Makes Us Want to Share

1. Happiness/Joy:

Our first emotional action in life is to respond to our mother's smile with a smile of our own. Joy and happiness are hard-wired into all of us. Joy increases when it is shared.

- ✓ **Nothing better than the self-satisfaction of giving.**
- ✓ **Giving contributes to an energy exchange that amplifies our own pleasure –it's something we're hardwired to do.**

WHAT TO GIVE

You can fund your Legacy Gift with cash, marketable securities, real estate, closely-held stock, excess retirement funds and life insurance. Our Gift Planning Department will be pleased to assist you and your advisors in planning a Legacy Gift that serves your financial needs and benefits Starkey Hearing Foundation.



A LEGACY MADE SIMPLE

How to Create a Legacy at Starkey Hearing Foundation



PLEASE TAKE THE NEXT STEP

It is a special person who envisions touching the lives of future generations. Legacy Gifts to Starkey Hearing Foundation will help us develop simple, sustainable and scalable programs in low and middle-income countries to bridge the gap to accessing hearing healthcare services. Regardless of its form or size, your Legacy Gift will have an impact upon those with hearing loss.

We look forward to working with you and your advisors to ensure that your gift will become an enduring and meaningful legacy for many years to come. If you have questions about making a Legacy Gift or other estate planning questions, please contact Bruce Schmädtz, Chief Financial Officer, at 952-918-5803.

For more information, please contact:

Bruce Schmädtz
Chief Financial Officer
4700 Washington Avenue
South Eden Prairie, MN 55344
(952) 918-5803
Bruce_Schmadtz@starkeyfoundation.org
plannedgiving@starkeyhearingfoundation.org



BE THE CHANGE

For many of us, there is a compelling need to make a difference — to leave a lasting impact on our friends and family, and the world in which we live. At Starkey Hearing Foundation, our aim is to provide a more comprehensive approach to help those with hearing loss before and after they receive a hearing device. Your Legacy Gift can help us do just that.

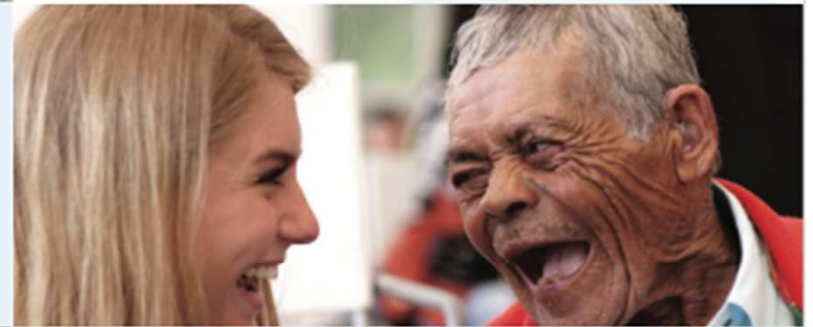
There are several easy ways to make an impactful gift that not only help thousands of people instantly, but could help you, your estate, and your heirs.

GIFTS BY BEQUEST

A bequest is perhaps the easiest and most flexible way to have a lasting impact on Starkey Hearing Foundation. You can name us as a beneficiary in your will or living trust, designating the gift of a specific dollar amount, a particular asset, a percentage of your estate, or the remainder of your estate once all of your other bequests have been fulfilled. With a bequest you maintain complete control of your assets during your lifetime, and can save on income taxes, capital gains taxes, and estate taxes.

LIFE INCOME GIFTS

Your gift to Starkey Hearing Foundation can also be designed to pay you income for life. This "life income gift" is a popular way that both you and Starkey Hearing Foundation can benefit. We agree to pay a fixed payment to you for life with the remainder benefiting Starkey Hearing Foundation. This type of gift is particularly attractive because you often can reduce taxes, increase your spendable income and, at the same time, make a gift that will have a substantial impact on our future. You benefit now and we benefit later.



BENEFICIARY DESIGNATIONS

It's as simple as requesting a change of beneficiary form from the company holding your assets (for example, your IRAs, 401(k)s and other retirement plans, bank accounts, commercial annuities, life insurance policies, and other assets) and including Starkey Hearing Foundation as a full or partial beneficiary. Beneficiary Designation will reduce income taxes and possibly estate taxes for your loved ones.

GIFTS OF RETIREMENT ASSETS

Retirement assets, such as a 401(k) or an IRA are a terrific way to make a tax-wise gift to Starkey Hearing Foundation. If you are 70 1/2 or older you can rollover up to \$100,000 per year from your IRA as a charitable gift. Tell your IRA administrator to transfer your gift directly to Starkey Hearing Foundation from your traditional or Roth IRA account. The gift will not be taxed as income to you.



Marketing in the Age of Tr



I Want To Be the Select Few

2. Prestige/Belonging:

Everyone wants to be included and to feel they are part of something larger than themselves. Make it easy for the donor to start a relationship with you. (Email, Mail or Event)

- ✓ Do you have a Legacy Society?
- ✓ Or other exclusive donor groups?

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



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. 1023



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 Guttar '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 Baumgatel 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

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 Derby

W THE WHEELER SCHOOL



Uplifting Emotion

3. Hope/Altruism:

If creating a vision of a better tomorrow resonates with your donor community, then triggering the emotion of hope is something you should integrate.

- ✓ Giving more than they thought possible.
- ✓ Be the change they want to see

Tell Me More



NON-PROFIT
U.S. POSTAGE
PAID
FREDERICK, MD
Permit No. 5289

I would like information about:

- Receiving income for life.
- How I can include Partners In Health in my will/trust.
- I have already included Partners In Health in my will/trust.

Name _____
Address _____
City, State Zip _____
Email _____
Telephone _____

From: Dr. Caven Shivanbizi examines Wilson Nampije, who is at Butaro District Hospital in Rwanda to receive chemotherapy for Hodgkin lymphoma. *Name changed. (Ceclie Joan Avika / Partners In Health)*



Together, we can prevent suffering

A gift that pays you back.

When you create a **Charitable Gift Annuity** of \$10,000 or more with Partners In Health, you receive fixed payments for life while providing lasting support to our mission.

Other benefits include:

- ◆ Generous annuity rates.
- ◆ Payments you receive are partially tax free for a period of time.
- ◆ A charitable deduction in the year of your gift.
- ◆ If funded with an appreciated asset, you are only partially taxed on gains.

Your planned gift will help provide medical care to some of the poorest and most remote corners of the world.

To learn more about charitable gift annuities, please go to: legacy.pih.org/annuity

For assistance, please contact:

Laura Sidla
Planned Gift Officer
857-880-5717
plannedgiving@pih.org



How much will I receive?

If you're looking for ways to support Partners In Health and receive a steady income stream, a charitable gift annuity may be your answer. See the rate table below:

Age	Rate	Annuity	Deduction
65	4.7%	\$470	\$3,623
70	5.3%	\$530	\$4,195
75	5.8%	\$580	\$4,650
80	6.8%	\$680	\$5,075

*Based on \$10,000 gift amount and a single annuitant.

**Please note that this information is for illustrative purposes and is not intended as tax or legal advice. Rates are subject to change.

NO POSTAGE
NECESSARY
IF MAILED
IN THE
UNITED STATES



BUSINESS REPLY MAIL

POSTAGE WILL BE PAID BY ADDRESSEE

PARTNERS IN HEALTH
PO BOX 996
FREDERICK MD 21705-9942



Photo: Ms. Asmine Pierre, the nurse responsible for the nutrition program in Boucan Carré, Haiti, makes a phone call during a home visit. (Ceclie Joan Avika / Partners In Health)



Without You We Can't Help...

4. Fear/Guilt:

You can play on this emotion to get the donor to believe they have a chance to right a wrong or improve something. (Or something may go terribly wrong if they don't act.) By getting them to feel responsible for a wrong, whether real or imagined, you can get the donor to act.

✓ **This is all fundraising, right?**

YES, I WANT TO MAKE A DIFFERENCE!



Name _____
Address _____
City State Zip _____
Phone _____
Email _____

- I have already included Pine Street in my long-term plans.
- Please send me tax-smart gift options to end homelessness.

For confidentiality, tear fold, tape and return.



HELP END HOMELESSNESS BY GIVING WISELY

Uncertainty is unsettling, especially not knowing where one will sleep, night after night. There is one thing that *is* certain. A gift through your long-term estate plans is a tax-smart way to give that ensures those in need will have a place to call home.

BENEFITS TO YOU	GIFTS TO CONSIDER
Keep control of your assets during your lifetime while making a gift that provides an estate tax deduction.	Include Pine Street in your will or trust .
Eliminate tax on capital gains and receive an immediate deduction of full market value.	Contribute long-term appreciated stock or securities .
If you are 70½ or older, avoid the penalty created by higher income.	Use your IRA qualified charitable distribution and transfer up to \$100,000 annually per person directly and tax-free to Pine Street.
Leave more for family by making a gift from the most highly taxed assets — avoiding income tax and reducing estate tax.	Name Pine Street in your retirement plan .
Make a gift with little cost to yourself while receiving a current income tax deduction.	Contribute a life insurance policy you no longer need.

A Home and Community for Everyone

If you could change the life of one person, would you? Mark is just one of many who has transformed his life because of supporters like you.

[Change your plans and change lives.](#)

Contact:
Kristina M. Lentz
Director of Capital and Leadership Giving
617.892.9182 or kristina.lentz@pinestreetinn.org
Visit: giftplanning.pinestreetinn.org/smartgiving



With Pine Street's support, Mark M., once homeless for many years, now has a home and a job.



Sorrow Helps Us Connect and Empathize

5. Sorrow/Suffering:

- The emotions of sadness and sorrow light up many of the same regions of the brain as happiness (perhaps fitting if one looks at sadness as the other side of happiness).
- The hormones produced when sad that help us create understanding and empathy may also make us more generous and trusting.
- ✓ **Images of puppies and/or babies get me every time...**

Tell me more.

I would like information about:

- Making a tax-free gift through an IRA charitable rollover.
- Other ways I can include Father Bill's & MainSpring in my estate plan.

Name _____

Address _____

City, State _____ Zip _____

Email _____

Telephone _____

For confidentiality, tear, fold, tape and return.



Non-Profit Org.
U.S. Postage
PAID
Brockton, MA
Permit No 378



Help us care for the future of our community.

The IRA charitable rollover is a terrific way to make a tax-free gift to **Father Bill's & MainSpring**. 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 FBMS.

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:

Lucille Cassis
phone: (781) 654-1684
email: lcassis@helpfbms.org
giving.helpfbms.org/IRA



Your gift will change lives.

Your gift is critical to ending homelessness for thousands in Southern Massachusetts.

All gifts to **Father Bill's & MainSpring**, including cash, securities, and retirement assets will help us provide a lasting investment in housing for those who have been struggling with homelessness for an extended period of time.

Regardless of how you choose to support FBMS, you are making an investment that will change lives for years to come.

Thank you.



DEVELOPMENT
FATHER BILL'S & MAINSPRING
430 BELMONT STREET
BROCKTON MA 02301-9808





Make 'em Laugh

6. Surprise/Humor:

- It grabs and holds attention – shows you are “one of them”
- It results in an emotional response – not just positivity but a connection to you and your brand
- Your message is remembered and shared
- ✓ **Being funny can work to the right audience**
- ✓ **It can also hurt you with the wrong message**

Hello, mom! I am calling from campus to tell you about the great charitable gift annuity rates.

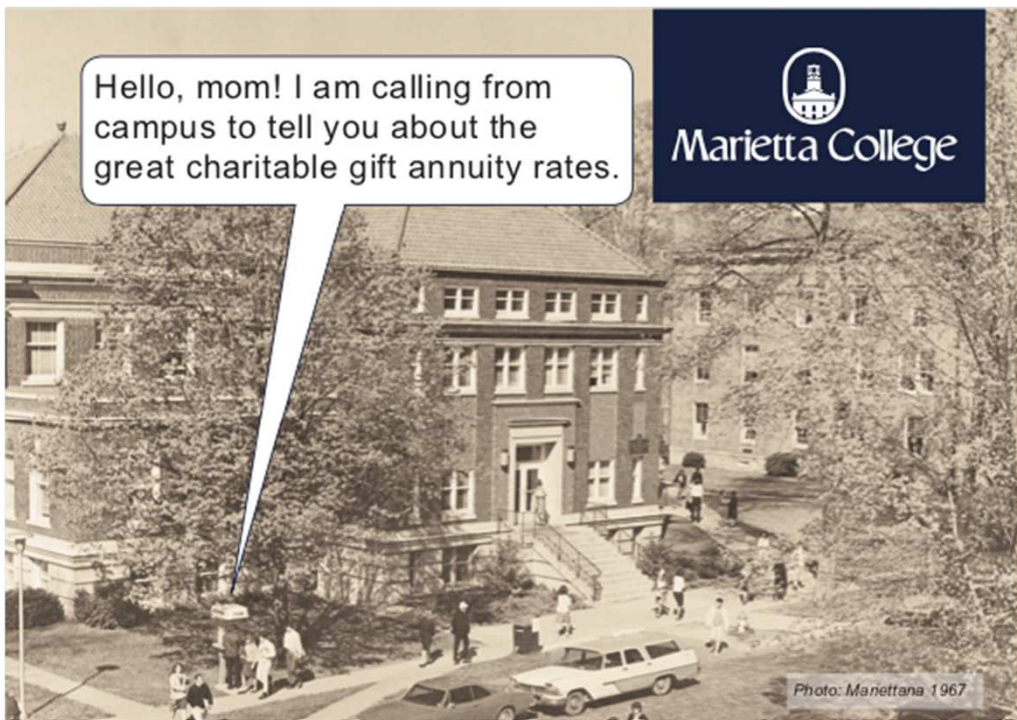


Photo: Manettana 1967

A GIFT THAT PAYS YOU BACK

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

NON-PROFIT
ORGANIZATION
U.S. POSTAGE
PAID
MARIETTA, OH
PERMIT NO. 36

If you're looking for ways to support Marietta College and receive a steady income stream, a charitable gift annuity may be your answer.

It is a simple contract between you and Marietta College. In exchange for a gift of \$10,000 or more, Marietta College will provide guaranteed fixed payments for life.

Other benefits include the following:

- You support Marietta College 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

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

Age	Annuity Rate	Annuity Amount	Charitable Deduction
65	4.7%	\$470	\$3,096
70	5.1%	\$510	\$3,798
75	5.8%	\$580	\$4,348
80	6.8%	\$680	\$4,850

* 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



Yes, and the longer you defer the higher the payment rate!

Party on Wayne!

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:

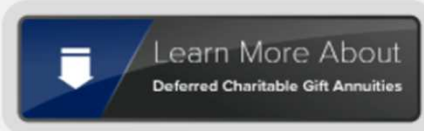
- You support Marietta College with a substantial gift.
- Payments you receive are partially tax-free for a period of time.
- You receive a charitable deduction in the year of your gift.

How much income will I receive with a gift of \$50,000?

Age	Years Deferred	Annuity Rate	Annuity Amount	Charitable Deduction
55	10	6.4%	\$3,200	\$18,479
60	8	6.3%	\$3,150	\$21,021
65	6	6.4%	\$3,200	\$22,604
70	5	6.8%	\$3,400	\$25,629
75	4	7.4%	\$3,700	\$28,370

* 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.

If you would like to learn more, please contact: Jarrett S. Stull, CFRE at 740-376-4446 or email jarrett.stull@marietta.edu.



CONTACT US
Jarrett S. Stull, CFRE
Director of Gift Planning and Major Gifts
740-376-4446
jarrett.stull@marietta.edu



Greed is Good...

7. Vanity/Envy:

It seems that everyone wants more of something. Appeal to the donor's desire for more power or influence.

- ✓ Flattery will get you their attention and possibly their gifts.
- ✓ Naming opportunities

TELL ME MORE



1303 San Jacinto Street
Houston, Texas 77002

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Houston, TX
Permit No. 8451

I would like information about:

Making a bequest to South Texas College of Law Houston.

Other ways I can include South Texas College of Law Houston in my estate plan.

South Texas College of Law Houston's Tax ID number is 74-1554976.

Name _____

Address _____

City, State _____ Zip _____

Email _____

Telephone _____

Please consider leaving South Texas College of Law Houston in your will. For more information, visit our planned giving website at legacy.stcl.edu.

For confidentiality, was folded, tape and return.



PRIVATE AND INDEPENDENT SINCE 1923

“South Texas trained me to think critically and apply the law practically — skills that helped me rise to the challenges and opportunities I faced throughout my career in business. A bequest is a way to show my gratitude and pay it forward to the next generation.”

— Jim Farr '77

WHAT IS YOUR LEGACY?

CREATE YOUR LEGACY WITH YOUR WILL

A charitable gift from your estate is a favored method of giving that enables you to achieve your financial goals and benefit STCL Houston. No other planned gift is as simple to implement or as easy to change should you ever need the assets during your lifetime.

Please Consider Making STCL Houston a Primary Beneficiary:

When you name STCL Houston as a primary beneficiary of your will or other estate plan, you create your legacy of learning and provide a gift STCL Houston can count on in the future.

Bequest Language for Donors:

The following is intended to help you and your attorney in drafting a bequest that satisfies your

individual interests. As you consult your attorney on the selection of appropriate wording to reflect your own goals and intentions regarding STCL Houston, be sure the organization's correct legal name appears in all final documents as:

“South Texas College of Law Houston, a Texas nonprofit corporation, Federal Tax Identification Number: 74-1554976.”

Already have a will?

Please consider adding STCL Houston in a Codicil to your will.

Donald J. Guter, President and Dean
dguter@stcl.edu or 713-646-1819
legacy.stcl.edu/bequest



*Please note that this information is not intended as tax or legal advice.

Your gift will change lives

To advance the importance of our mission of providing a diverse body of students with the opportunity to obtain an exceptional legal education, and prepare graduates to serve their community and profession with distinction, we invite you to find a place for South Texas College of Law Houston in your estate planning arrangements alongside family, friends, and other loved ones.

Your generosity helps make this happen. No matter what you choose to support, or how much you choose to give, you can be sure that your gift will make a difference.

NO POSTAGE
NECESSARY
IF MAILED
IN THE
UNITED STATES



BUSINESS REPLY MAIL

FIRST CLASS PERMIT NO. 1001 HOUSTON, TEXAS

POSTAGE WILL BE PAID BY ADDRESSEE

South Texas College of Law Houston
Philanthropy and Alumni Relations
1303 SAN JACINTO STREET
HOUSTON, TEXAS 77002-7006





Trust In You

8. Humanity/Conviction:

- Donors feel they can depend on you – that you mean what you say and you'll do what you say.
- You have the know-how, competence, and expertise.
- They feel you have their interests at heart and that you'll take care of them throughout the transaction, and beyond.

✓ **Building relationships is what we do.**

Tell me more



2775 Algonquin Road, Suite 240 |
Rolling Meadows, IL 60008

Non-Profit Org.
U.S. Postage
PAID
Permit No 286
Arlington Heights, IL

I would like information about:

- Receiving income for life
- How I can include the Human Development Foundation in my estate plan

Name _____

Address _____

City, State _____ Zip _____

Email _____

Telephone _____

THE FUTURE STARTS HERE



For confidentiality, tear, fold, tape and return.

Create an estate plan that brightens the future

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 **The Human Development Foundation** 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 HDF in your will or estate plan, you will help us to empower impoverished communities and individuals with the tools and resources needed to achieve and sustain a better way of life. It is a great opportunity to pay forward everything that the Human Development Foundation has meant to you.

For sample language that makes it easy to give through your will, please go to:

plannedgiving.hdf.com/will

For assistance, please contact:

Maria Hashmi
Director of Development
Phone: (847) 490-0100
Email: plannedgiving@hdf.com



The Founder's Legacy Society

The Founder's Legacy Society celebrates the commitment of donors who have provided for a gift in their estate plan to ensure the future of the Human Development Foundation's mission – to facilitate a non-political movement for positive social change and community empowerment.

The foresight of our Founder's Legacy Society members will provide vital resources needed for years into the future to continue the fight against extreme poverty and for the respect and dignity of every individual.

HDF has already benefitted over one million constituents. You are invited to include HDF for a gift from your estate and to join a select group of like-minded supporters committed to restoring human dignity and improving the quality of life of those in Pakistan.

HUMAN DEVELOPMENT FOUNDATION
2775 ALGONQUIN RD STE 240
ROLLING MEADOWS, IL 60008-9900

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POSTAGE WILL BE PAID BY ADDRESSEE





What We Learned From 45?

1. Throw rules out of the window
2. Consistency and repetition is key
3. Simple, easy-to-remember content resonates
4. Authenticity and confidence resonates
5. Know your audience
6. Emotion over facts (storytelling)



Questions?





Still Have a Question?

Contact: Andrew Palmer

Email: apalmer@pgcalc.com

Phone: 888-497-4970