



Trends in Marketing Planned Gifts



Date: May 22, 2014
Time: 1:00 – 2:30 Eastern Time
Presenter: Andrew Palmer
Director of Marketing Services
PG Calc



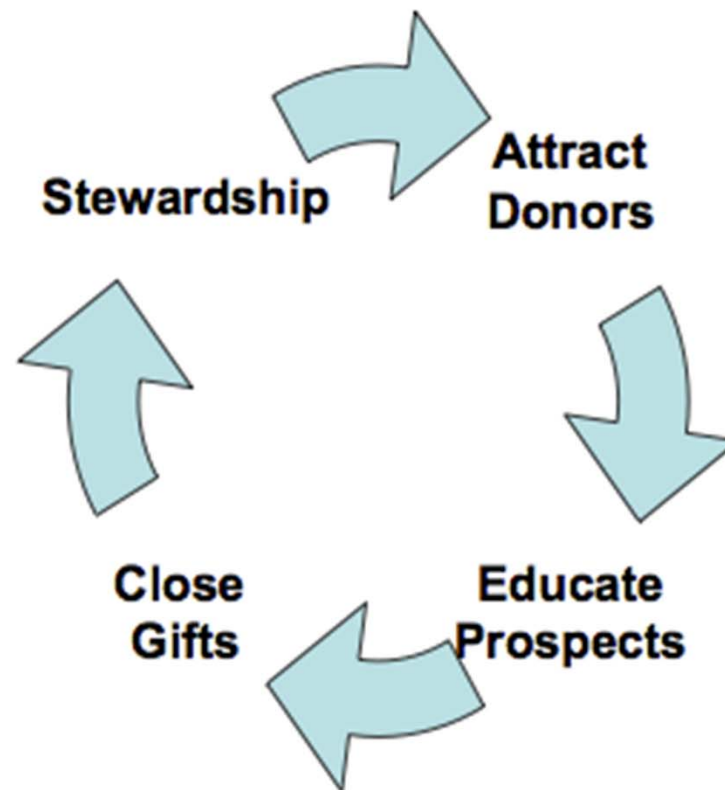


Agenda

- Eight Trends in Marketing for 2014
- For-Profit and Non-Profit
- Planned Giving



Planned giving marketing



IS YOUR JOB KILLING YOU?

We may accuse each other of exaggerating when we say our jobs are killing us, but it might not be that much of an exaggeration. Dozens of studies over the years have linked job stress to increased incidences of disease and death. Discover who is most at risk, what causes workplace stress, what the likely consequences are and how both employers and employees can reduce the problem.



WHO IS AT GREATEST RISK FOR WORK-RELATED STRESS DEATH?

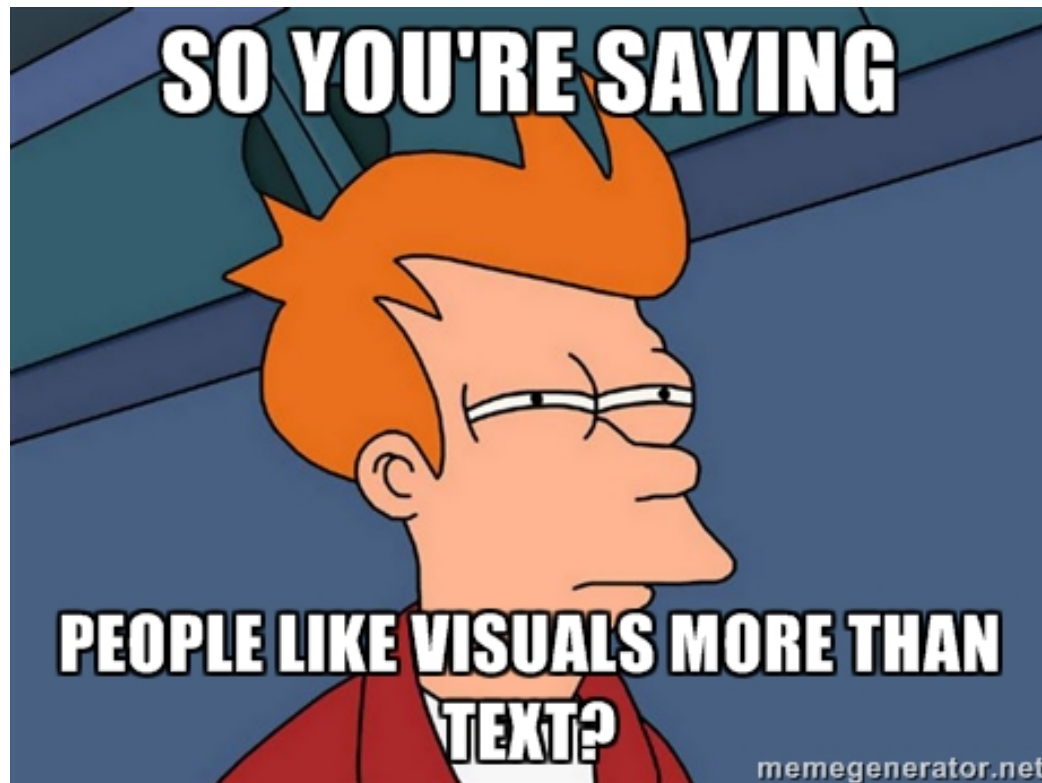


Trend (1) Visually oriented design

- Easy digestible image-centric content
- Articles with images receive more interest
- Images engage your audience

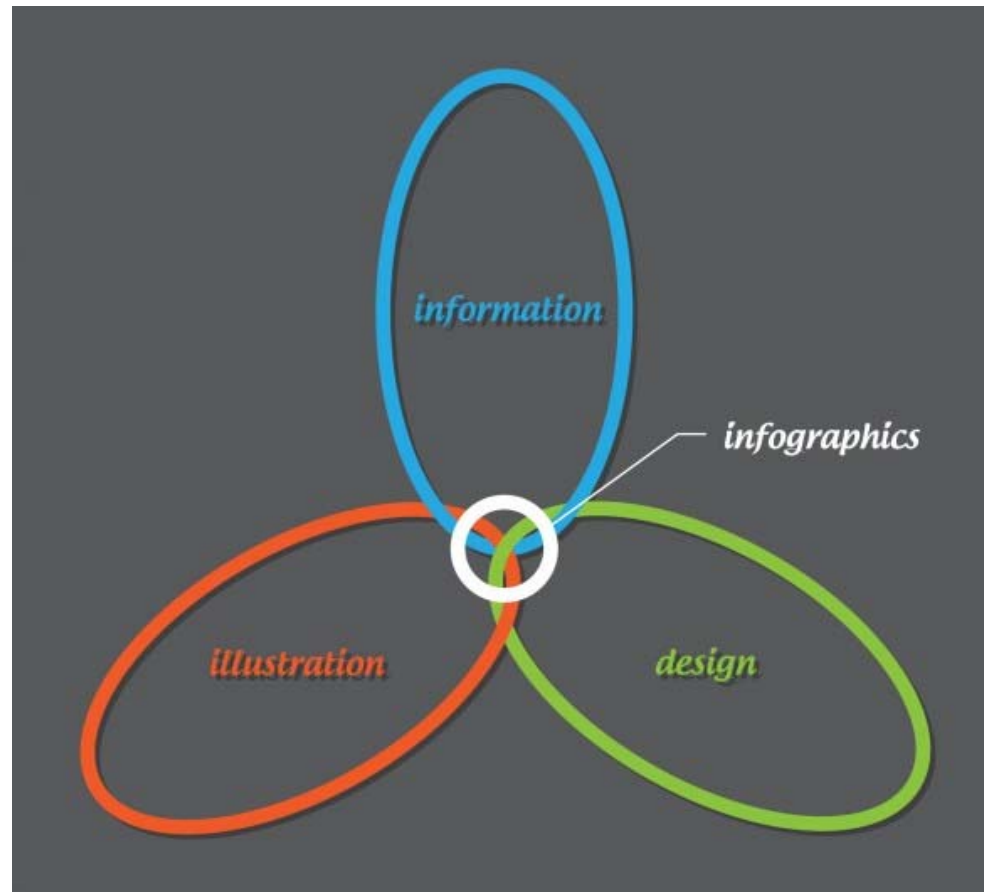


(1) Visuals are a key to your marketing



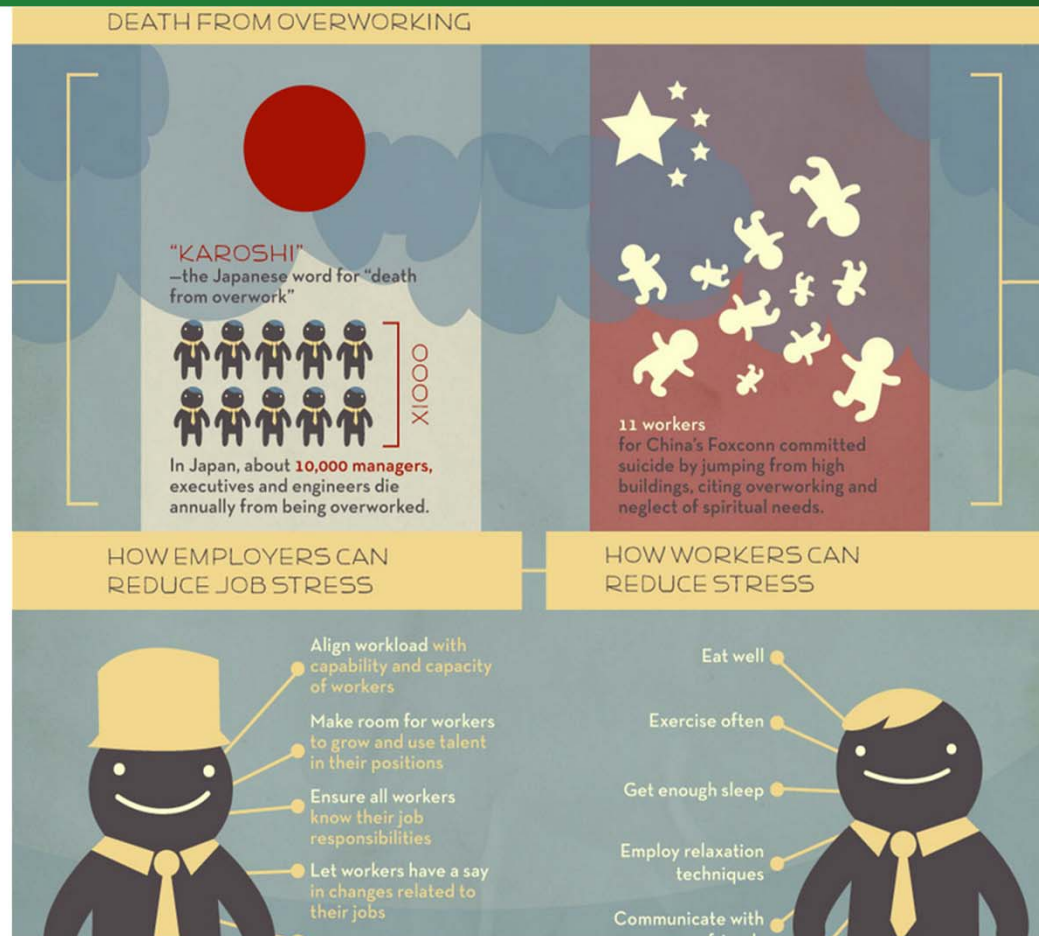


(1) Infographics





(1) Work stress infographic





(1) Tufts gift planning infographic

Gift Planning at Any Age

IN YOUR 20s AND 30s
With almost every new job comes a new benefits package. Did you know that you can name a charity as a beneficiary of your IRA, 401(k), or other retirement plan? By designating the university to receive any amount or percentage of the remainder of your plan, you can provide for a gift in the future.

IN YOUR 40s
A will allows you to control how your assets will be distributed at your passing. Without a will, state law determines how your estate will be distributed, and those laws may not reflect your wishes. When creating your plans, consider designating a percentage or a specific amount to charity.

IN YOUR 50s
Retirement isn't as far off as it once seemed. Establishing a flexible deferred charitable gift annuity allows you to make a gift now and defer the payments until retirement. Deferred gift annuities are a great way to receive a fixed income stream in the future while benefiting from an immediate charitable income tax deduction while you are still working.

IN YOUR 60s
You may be interested in ways to make a gift while receiving income. A charitable remainder unitrust distributes a gift to a charity when the trust terminates and gives you an immediate charitable income tax deduction when you set it up. You, or others you name, receive a variable income stream with the potential for growth over time.

IN YOUR 70s
You might want to make a gift but also want to increase your income. Charitable gift annuities allow you to make a gift and provide you (or up to two people you name) with fixed income for life. Rates increase as you age, so now may be the right time to set up a charitable gift annuity.

IN YOUR 80s
Your home, vacation house, investment property, or business may no longer fit your lifestyle. Donating a piece of property to charity can free you from paying real estate taxes, maintenance costs, and insurance, while also allowing you to remove the asset from your taxable estate and avoid some capital gains taxes.

WHERE THERE'S A WILL...
If you drafted your will years ago, it may be outdated by now. As your life changes, you will want to make sure that your plans still reflect your desires. Consider adding your favorite charities to your will.

IN YOUR 90s
Since rates increase as you get older, now may be a great time to create a charitable gift annuity. You can support the university you love while receiving the highest payout rate possible, currently up to 9.0 percent.

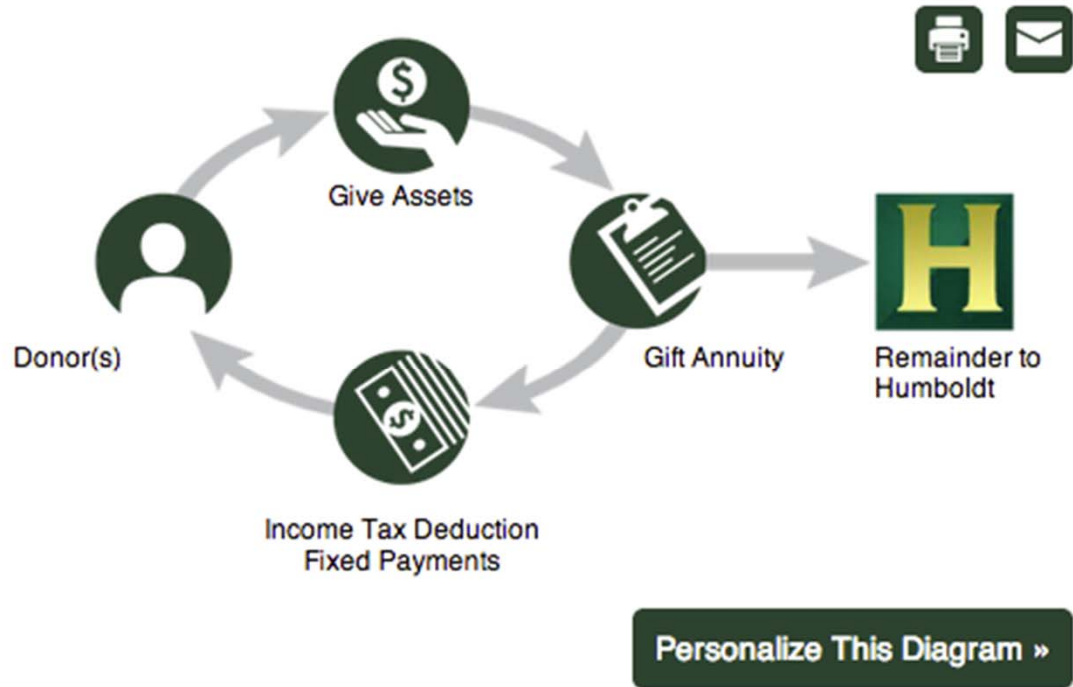


Tufts initiated the project and created the copy.

It was illustrated by John Martz.

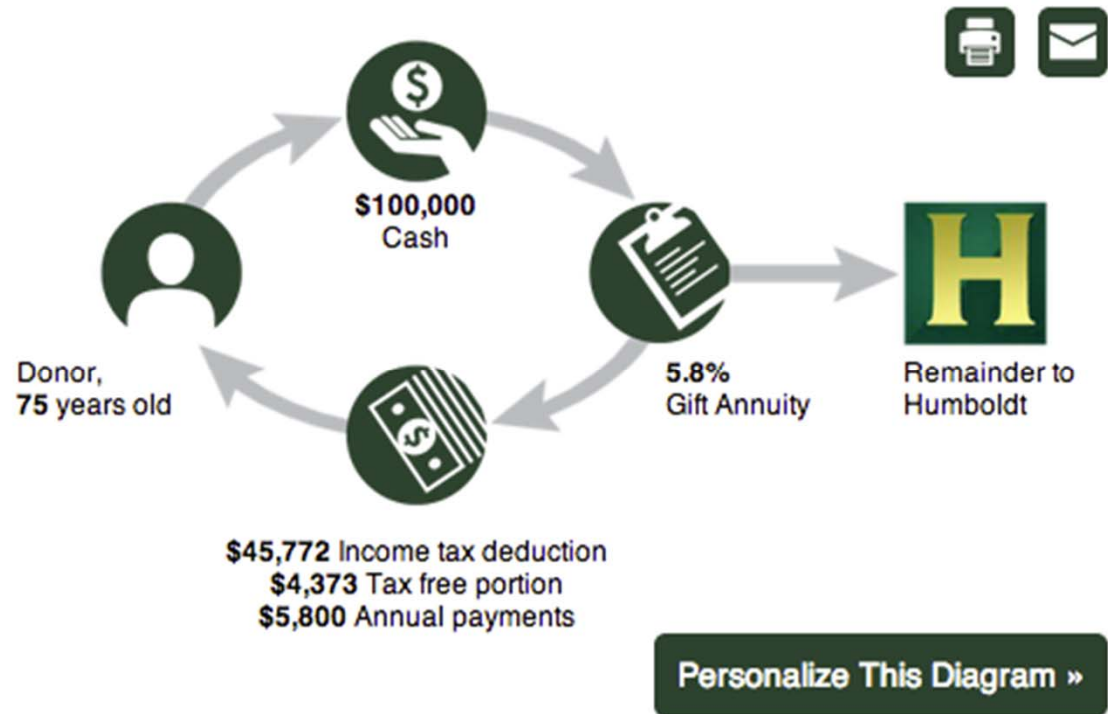


(1) Gift diagram and calculator





(1) Interactive infographic





(1) Google authorship

What is Planned Giving? - Nonprofit - About.com



nonprofit.about.com › ... › Glossary › P - Q
by Joanne Fritz - in 2,397 Google+ circles

The heart of **planned giving** is a simple bequest program but can be much more sophisticated with a number of more complex financial instruments.

Planned gifts | Ways to give | Giving to MIT

giving.mit.edu › Ways to give › Massachusetts Institute of Technology

When you make a **planned gift** to MIT, you and/or your beneficiaries (age 50 and up) receive payments for life. Upon the death of the last surviving beneficiary, ...

Giving to Columbia: **Planned Giving**: Overview

www.columbia.planyourlegacy.org/

Pave the way for future students, faculty, and pivotal projects at Columbia University through **Planned Giving**. Every day, Columbia University and its alumni ...

Searches related to **planned giving**

- planned giving **brochures**
- planned giving **statistics**
- planned giving **resources**
- planned giving **design center**
- planned giving **marketing**
- planned giving **jobs**
- planned giving **program**
- planned giving **council**





(1) Who would you rather interact with?





(1) Three leading trends in web design

- Clean design
- Easy to use
- Credibility of fresh content



Trend (2) Less is more





(2) Keep your message simple

- The benefits of giving clear
- Not too many options
- Access to information easy
- Make contact process simple



(2) If one starburst works... try six!

We Provide Great Service, Excellent Work and Bargain Prices!

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INTERIOR PAINTING

3 BR	\$3000	\$2500	SAVE \$500
4 BR	\$3300	\$2800	SAVE \$500

Price is based on an average home. It includes one coat of Repro-Brand latex flat paint on walls and ceilings, color the same color. On walls & ceilings in the kitchen & bathroom, semi-gloss paint is used. Other work, including doors, casings, baseboards, or new moldings, crown, ceiling soffits, wallpaper removal and wallpapering not included. See our site at www.millerandsons.com. Expires 12/31/11



(2) Simple direct mail

BISHOP FEEHAN HIGH SCHOOL

Gift Annuities

Create A Legacy At Bishop Feehan With A Gift That Pays You Back

With a Charitable Gift Annuity, you can support Bishop Feehan and receive benefits in return:

- > dependable, fixed payments for life
- > payments received partially free of tax
- > charitable deduction in the year of your gift

If you would like to learn more, please contact the Christopher Servant at: 508-226-7411, cservant@bishopfeehan.com

Sample Annuity Rates*

Minimum gift amount is \$10,000 and the minimum age is 60 years old.

Single Life CR Annuities		Two Life CR Annuities	
Age	Rate	Age	Rate
60	8.0%	60/60	5.2%
65	7.8%	65/65	5.7%
70	6.8%	70/70	5.7%
75	5.8%	75/75	5.0%
80	5.1%	80/80	4.8%

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



(2) Simple visual design

BISHOP FEEHAN HIGH SCHOOL

[ABOUT FEEHAN](#) ✦ [SANCTITY](#) ✦ [ADMISSIONS](#) ✦ [ACADEMICS](#) ✦ [ATHLETICS](#) ✦ [STUDENT LIFE](#) ✦ [SUPPORT BFHS](#) ✦ [ARTS](#) ✦ [ALUMNI](#)

PLANNED GIVING

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

Planned Giving

[Text +](#) | [Text -](#)

Bishop Feehan High School has an Advancement Office that is committed to "advancing" the mission of the school, which involves financial support, public relations and community involvement. As a parent, alum, or friend you are asked to partner with us in one, if not all three of these goals.

As a Catholic school, Bishop Feehan does not receive any federal or state funding; therefore, it must charge tuition to exist. As a Catholic school committed to providing a quality education to all who desire it, and not just those who can afford it, Bishop Feehan's tuition ranks as one of the most affordable schools in New England!

Your generosity makes it possible for Bishop Feehan to continue its unique tradition of teaching, research and learning. Donations to Bishop Feehan help us provide students with an invaluable one of a kind academic experience and memories for a lifetime.

Talk to Us

[Our Office of Advancement >](#)

[Call \(508\) 226-7411](#)

Getting Started

Make a Bequest



(2) The 300 million dollar mistake



Less clicks equals more conversions



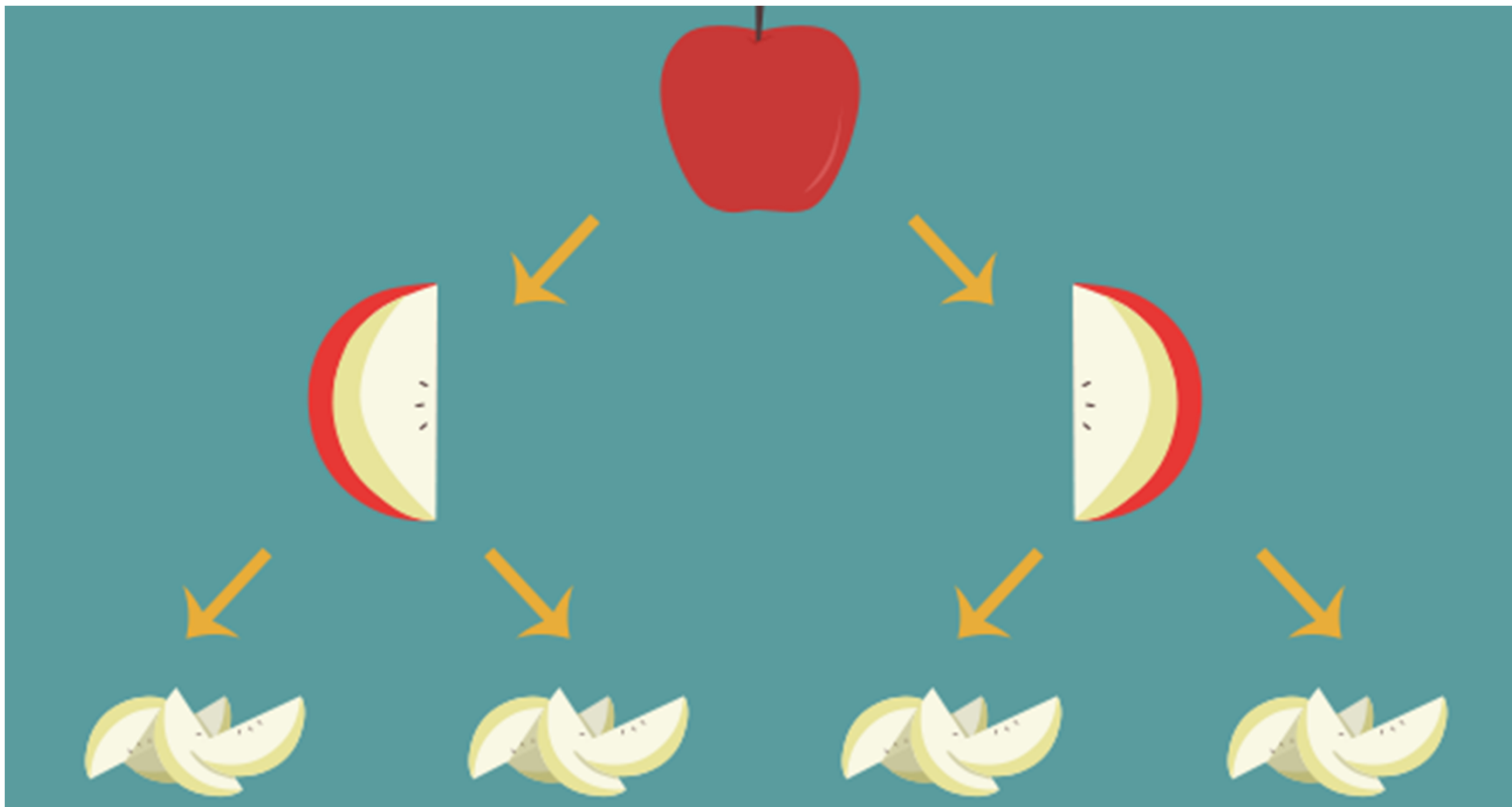
Trend (3) Testing



There is no failure. Only feedback.



(3) A/B or split testing





(3) Popular A/B tests

- **Headline**
- **Call to Action**
- **Layout**



(3) Headline, subject line, bullet points

The four U's:

- Urgent
- Unique
- Useful
- Ultra-specific



(3) What to test?

ONE LAYOUT 	VS	 ANOTHER LAYOUT
One Call To Action Get Your Free Trial Today!	VS	Another Call To Action Click Here For Instant Access.
 IMAGES	VS	Text Only The world's fastest laptops can't be found in your local computer store. <u>Click here to learn where to get them</u>
Upright Want to be as happy as this guy?	VS	Angled Want to be as happy as this guy?
Button	VS	Blue Underlined Text
Regular Border Have a fresh hamburger delivered to your door every day.	VS	False Border & Dropshadow Have a fresh hamburger delivered to your door every day.



(3) Call to action testing


Enter Your E-Mail Address Below

you@company.com

We Value Your Privacy!

Enter Your E-Mail Address Below

you@company.com


TESTED 01-OCT

We Value Your Privacy!

23% more conversions adding the security icon



(3) Test everything

 Y YELLOW > OPTIMISTIC AND YOUTHFUL OFTEN USED TO GRAB ATTENTION OF WINDOW SHOPPERS	 R RED > ENERGY INCREASES HEART RATE CREATES URGENCY OFTEN SEEN IN CLEARANCE SALES	 B BLUE > CREATES THE SENSATION OF TRUST AND SECURITY OFTEN SEEN WITH BANKS AND BUSINESSES	 G GREEN > ASSOCIATED WITH WEALTH THE EASIEST COLOR FOR THE EYES TO PROCESS USED IN STORES TO RELAX
 O ORANGE > AGGRESSIVE CREATES A CALL TO ACTION: SUBSCRIBE, BUY, OR SELL	 P PINK > ROMANTIC AND FEMININE USED TO MARKET PRODUCTS TO WOMEN AND YOUNG GIRLS	 B BLACK > POWERFUL AND SLEEK USED TO MARKET LUXURY PRODUCTS	 P PURPLE > USED TO SOOTHE AND CALM OFTEN SEEN IN BEAUTY OR ANTI-AGING PRODUCTS



(3) The testing tips

- Test one thing at a time
- Record results
- Manage expectations

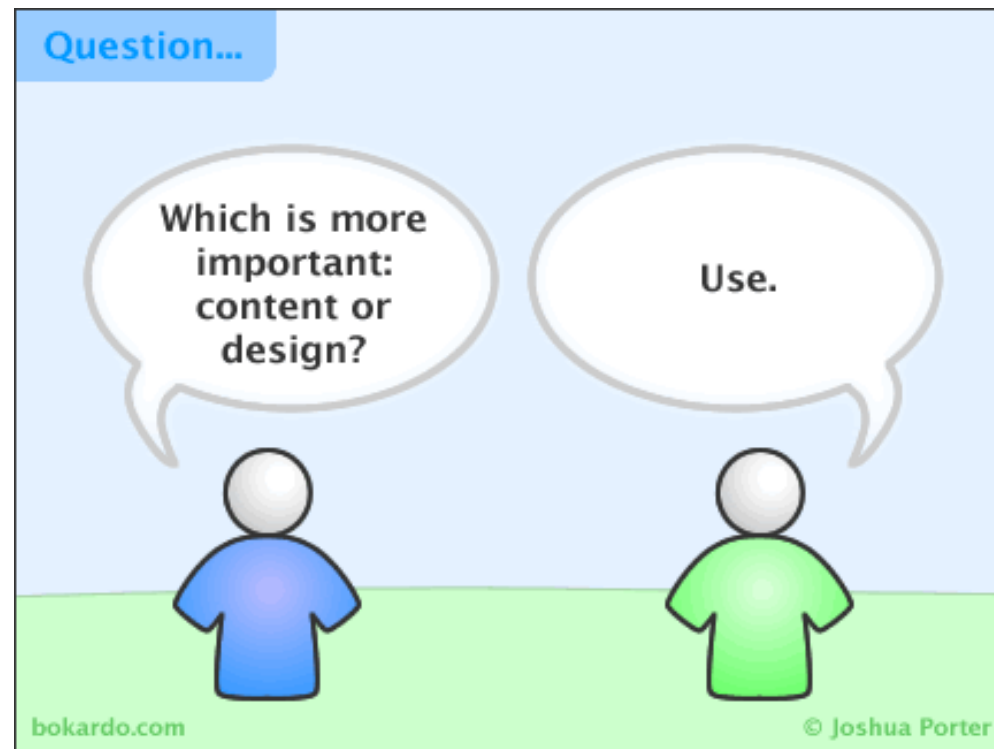


(3) Institutional testing notebook

- Why, and what happened
- Short pre-test & post-test summary
- Numeric results, interpretation & suggestions



Trend (4) Content marketing





(4) Educate, engage & entertain

- Planned giving awareness
- Show why donor support makes a difference
- Build trust and credibility



(4) Content builds awareness





INBOUND MARKETING FUNNEL

for
PROFESSIONAL SERVICES



Great content till the very last drop!

- 1 CONTEXT**
Generate target traffic.
 - organic search
 - social media
 - ppc advertising
- 2 CONVERSATION**
Captivate with rich content that makes a human connection.
 - video, blog posts, website

Offer valuable advanced content.

 - case studies, whitepapers
 - "how-to" guides, checklists
- 3 CONNECTION**
Create a connection.
 - calls-to-action
 - landing pages


Nurture prospective clients

 - targeted email campaigns
- 4 COMMUNITY**
Capture the opportunity and build a community
 - proposal
 - interview, presentation, demo



(4) Newsletter articles are valuable

Anton R. Fried, MD Legacy Gift Endows Chair of Department of Medicine



Last summer, the Charitable Foundation received the final distribution of a \$2.5 million bequest from a trust originally set up by former Newton-Wellesley Hospital physician, Anton R. Fried, MD, who passed away in 1980 at the age of 94.

Dr. Fried came to the then-called Newton Hospital in 1914 as an internist with a special interest in cardiology. He served as Medical Staff President from 1941 to 1942 and was on the Executive Committee. Dr. Fried was a dedicated physician who was deeply committed to the teaching mission of the Hospital. He established the Anton Fried Lecture Fund to bring nationally recognized experts in medicine and surgery to teach the residents and medical students at the Hospital. He also named the Hospital as the remainder beneficiary of a trust set up for his wife and son, now both deceased.

To keep Dr. Fried's legacy alive for generations to come, the decision has been made to use the funds from this bequest to endow the Anton R. Fried, MD Chair of the Department of Medicine. The income generated by this endowment will be used to offset the Chair's salary expense in the operating budget, enabling the Hospital to address other needs.

Dr. Lawrence S. Friedman is the first physician to hold the Anton R. Fried, MD Chair of Medicine and has been at Newton-Wellesley since 2003. He also is Assistant Chief of Medicine at Massachusetts General Hospital and an esteemed Professor of Medicine at both Harvard Medical School and Tufts University School of Medicine. He has been at the forefront of developing educational programs and training in gastroenterology for virtually his entire postfellowship career and has expanded the teaching program at Newton-Wellesley. The American Gastroenterology Association recently presented Dr. Friedman with its Distinguished Educator Award for his achievements as an outstanding educator over a lifelong career.

"It is a personal honor for me to hold this Chair, which reflects on the growth and excellence of our faculty and teaching program here at Newton-Wellesley," said Dr. Lawrence Friedman. "More importantly, having an endowed chair elevates the stature of both the position and the institution. It will enable Newton-Wellesley to recruit outstanding Chairs of Medicine on a national basis in the future."

For more information on establishing endowments to support a Chair or Chief position, please contact Joan Archer or Liz Gianikas at (617) 243-6243 or NWHCF@partners.org.

Irene and Fredrick J. Stare, MD Visiting Professorship in Gastroenterology



On November 14, 2012, Dr. Lawrence Friedman, the Anton R. Fried, MD Chair of the Department of Medicine, and Dr. Richard Curtis, Chief of Gastroenterology, launched the Irene and Fredrick J. Stare, MD Visiting Professorship in Gastroenterology at Newton-Wellesley Hospital. Generously endowed by Irene Stare, this program is committed to enlisting an outstanding specialist in the field of Gastroenterology to visit the Hospital every year to share current research and treatment recommendations with the medical staff, house staff residents and interns, and medical students.

The inaugural Stare professor was Dr. Willis C. Mackinnon, a nationally recognized expert in liver diseases. He currently serves as Professor of Internal Medicine and Assistant to the President at The University of Texas Southwestern Medical Center at Dallas. Dr. Mackinnon gave presentations on Drug-Induced Liver Injury and Alcoholic Liver Disease—two areas in which he is considered one of the world's foremost authorities.

Irene Stare is a beloved member of our Newton-Wellesley community and a committed philanthropist who is very grateful to Dr. Curtis for the decades of expert and compassionate care that he has provided to her and her late husband, Dr. Fredrick J. Stare. Dr. Stare was a world-renowned expert in the field of nutrition and founder of the Department of Nutrition at the Harvard School of Public Health. Irene was delighted to endow the Stare Visiting Professorship in Gastroenterology as a tribute to her husband and his commitment to medicine and education, as well as in recognition of Dr. Curtis.

The Stare Visiting Professorship in Gastroenterology is part of the Endowed Fund for the Chair of Gastroenterology established in 2010. To date, over \$12 million has been raised toward a goal of \$15 million to fully endow this initiative.

The Charitable Foundation welcomes your involvement in this program. For more information, please contact Joan Archer or Liz Gianikas at (617) 243-6243 or NWHCF@partners.org.

Planned Giving Update Review and Update Your Estate Plan



Even though the holidays are now distant memories and 2013 is well underway, it is still a good time to do those things that we meant to do last year but never quite found the time to accomplish. For many, the list includes updating or completing your estate plan.

For those with wills, it might need updating if any major events have occurred:


- Change in marital status.
- Size of your estate has changed up or down significantly.
- Children or grandchildren have been born or passed away.
- The person named as your executor is unable to serve.

Even without these events, it is a still a good idea to revisit your will on a regular basis due to the ever-changing federal and state estate tax laws.

When you create or review your will, you have an opportunity to consider gifts to the community as well as to your family and friends. Take a moment to think about Newton-Wellesley Hospital and other organizations that have been important to you and consider what kind of legacy you might provide for them. As with all gifts, bequests are greatly appreciated and will help others receive the high quality, compassionate care you or your loved ones have received at Newton-Wellesley Hospital.

If keeping your estate plan current is important to you, resolve to do it in 2013. We can help you get started. Call Joan Archer or Liz Gianikas at (617) 243-6243 or email NWHCF@partners.org.

Charitable Giving and What You Need to Know



During recent efforts to avoid the "fiscal cliff," Congress passed the American Taxpayer Relief Act of 2012, which has three primary implications for donors and their charitable giving for 2013:

- IRA Charitable Rollover Extension**
The provision now allows individuals aged 70½ and older to donate up to \$100,000 from their Individual Retirement Accounts (IRAs) to public charities without having to count the distributions as taxable income for federal tax purposes. The IRA charitable rollover has been reinstated for all of 2013 and will now expire on December 31, 2013.
- 3% Reduction Rate**
There is now a modest impact on charitable giving for high net income donors. The legislation reduces the value of itemized deductions (all itemized deductions, not just charitable) for wealthy households by 3 percent of a taxpayer's income above a certain threshold.
- Capital Gains Tax Rates**
Capital gains tax rates have moved from 15% to 20% for most types of appreciated assets. There is also a new 3.8% surtax imposed on certain taxpayers.

For more information on how these changes could affect your charitable giving, please contact your attorney or tax advisor. We can also help with questions about how to utilize an IRA to support Newton-Wellesley Hospital. Please contact Joan Archer or Liz Gianikas at (617) 243-6243 or NWHCF@partners.org or visit www.nwhcf.org/plannedgiving.



(4) Email too!



MĀLAMA

QUARTERLY ONLINE NEWSLETTER



VOLUME 34.1
JANUARY - MARCH 2013

On Oahu:
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BRING HOPE • REDUCE FEARS • IMPACT LIVES

Hospice Means Hope: Our Hopes for the Future




When Hospice Hawaii was established in 1979, it was in response to a grassroots movement across America to find a better way to care for people who were dying. In fact, discussions about the organization began with weekly meetings at the dining room table of one of our founders, Rose Ann Poyzer. The idea was to find a way to provide care to those on their final journey in life that combined physical, emotional, social and spiritual support along with respect and dignity. [Click here to read more...](#)

President's Message



MĀLAMA

QUARTERLY ONLINE NEWSLETTER



VOLUME 34.1
JANUARY - MARCH 2013

BRING HOPE • REDUCE FEARS • IMPACT LIVES

What's your Inspiration?



The start of a new year is a source of inspiration - a new beginning and a chance to tackle the things we didn't quite get to in the preceding year. One of those yet-to-be-started projects may be organizing your affairs and putting an estate plan in place. This is one of the most important gifts we can give ourselves and our loved ones, but it can be a hard project to begin. Everyone needs:

- A will or revocable living trust
- An advance health care directive
- A health care power of attorney
- A general durable power of attorney

Donors tell us when they put these documents in place, they experience great peace of mind. When you create or update your will or living trust this year (we are optimists at heart!), please consider including a bequest gift to Hospice Hawaii. It's easy to do and so important. You know the significance of the compassionate care we provide to patients and families during their greatest times of need, and your bequest gift will help make this possible in the future. Here's sample bequest language you can share with your attorney:

*I hereby give to Hospice Hawaii, a Hawaii nonprofit corporation whose principal office is located at 860 Iwilei Road,



(4) To send or not to send...

- Is your email a good read?
- Is the audience taking away anything?
- Can they get the same thing anywhere?
- Don't be afraid to be real



SOCIAL MEowDIA EXPLAINED



I LIKE MY CAT



I'M PLAYING WITH MY CAT



WATCH THIS VIDEO OF MY CAT



I'M VERY SKILLED AT TRAINING CATS



HERE'S A HIPSTER PICTURE OF MY CAT



HERE IS HOW TO TRAIN YOUR CAT TO DANCE



I FREAKIN' HATE THIS CAT FOOD



I WORK FOR GOOGLE AND I HAVE A CAT



I AM LISTENING TO THE SONG "SOFT KITTY"



THIS IS WHERE I GOT MY CAT HOODIE





Trend (5) Social media

- Social is not for every office
- Piggy back on existing efforts
- It's best for awareness and stewardship



(5) Is your audience on social media?





(5) Baby boomers are here...

- 65+ are the fastest-growing group
- 45 to 54 are the fastest-growing on Facebook and Google
- Boomers aging with technological sophistication



(5) Facebook



American Red Cross · 555,662 like this
September 12 at 1:20pm · 🌐



👍 Like

Today's #NPM13 tip! Weather can change fast, and a battery-powered or hand-crank radio may be your only way to get information on what's happening outside. Do you have one in your kit?



Like · Comment · Share

🗨️ 214

👍 1,068 people like this.

Top Comments ▾



(5) Instagram







(5) Pinterest



UNICEF in Emergencies




44 Pins




Follow

State of the World's Children...




13 Pins

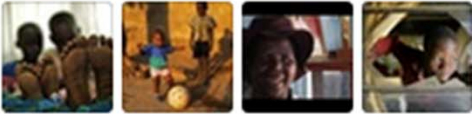


Follow

UNITE FOR CHILDREN, UNIT...



10 Pins



Follow

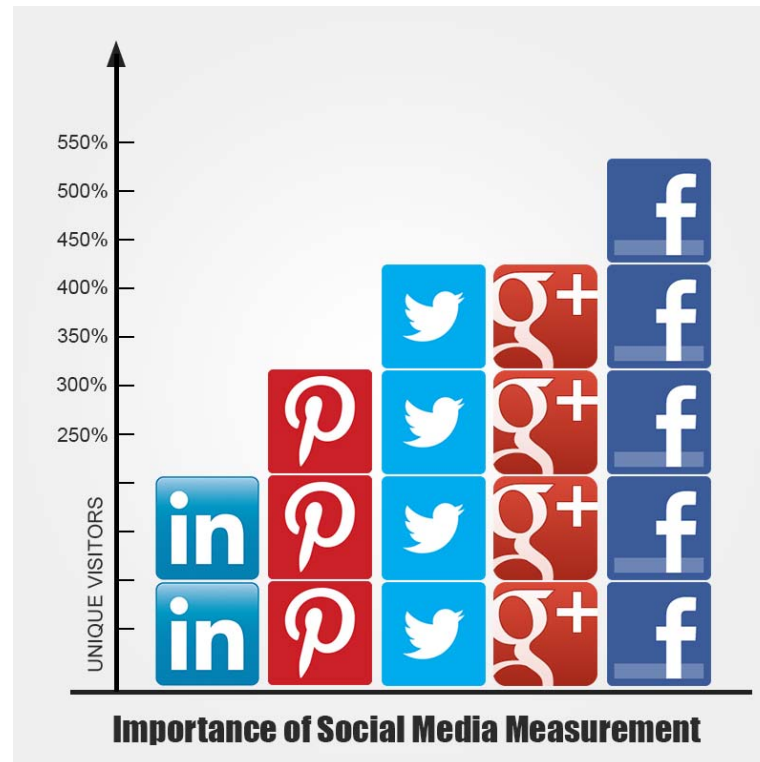


(5) Google+





(5) If you jump in, be ready to measure



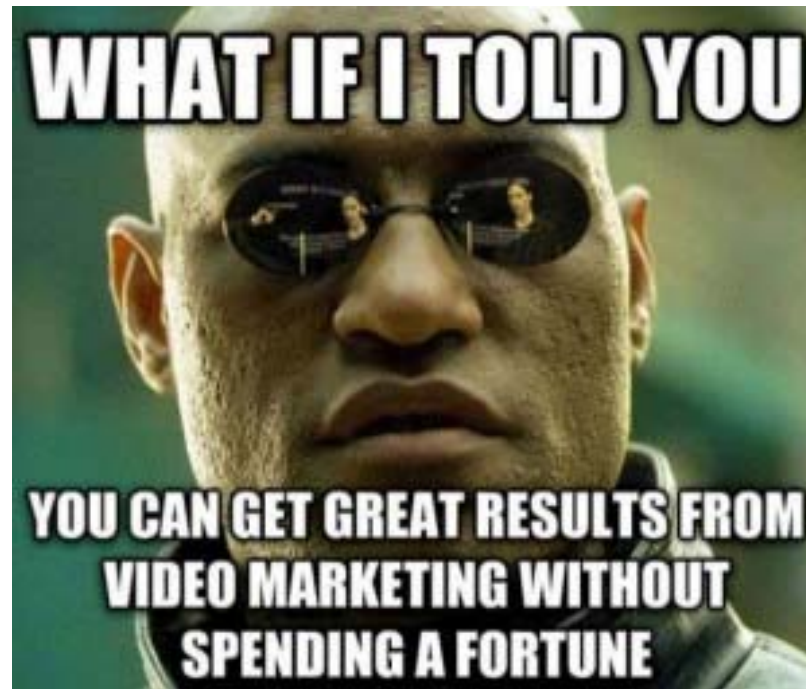


(5) Measure your efforts

- Audience growth rate
- Average engagement rates
- Visitor frequency rate
- Influence



Trend (6) Video marketing



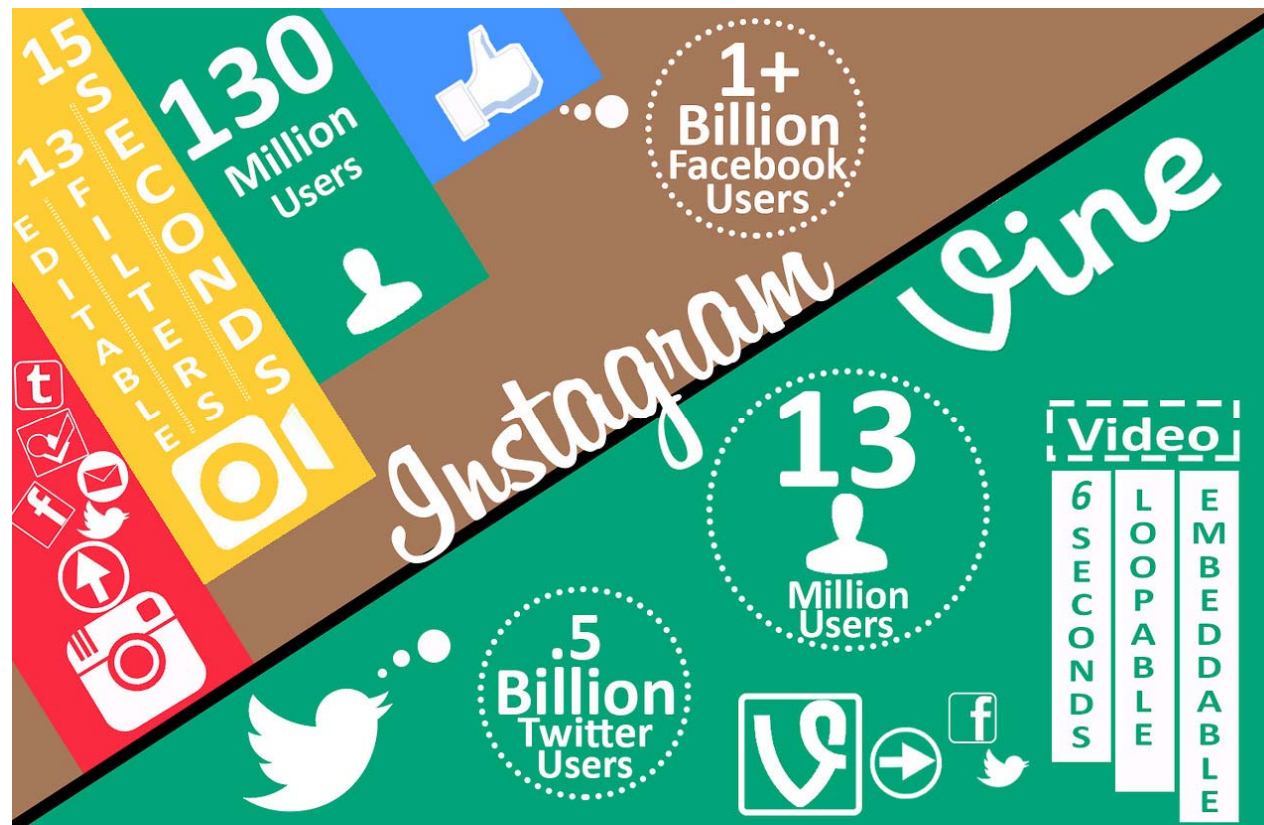


(6) Great for your website

The screenshot displays the University of Nebraska Foundation website. At the top is a dark navigation bar with the logo on the left and menu items: GIVE NOW, CAMPUSES, STORIES, WAYS TO GIVE, RECOGNITION, ABOUT, and CONTACT. Below the navigation bar, the breadcrumb trail reads "NU Foundation • Ways to Give • Planned Giving". The main content area features the heading "Make a Planned Gift, Leave a Legacy" followed by a paragraph: "No matter your circumstances. No matter your age or financial situation. If leaving a legacy at the university is something important to you, we can help through planned giving." Below this is the sub-heading "We made it easy to give." and another paragraph: "It all starts with your email address. We'll use it to better direct you to your area of interest quickly and securely." There are two input fields: one for "Enter your e-mail address" with a right-pointing arrow button, and another for "Search" with a magnifying glass icon. To the right of the text is a video player titled "What Mark Do You Want to Leave?" showing a woman in a red top in an office setting. The video player includes standard controls like play, volume, and a progress bar showing 0:00 / 5:00.



(6) Instagram and Vine





(6) Social and video together...





Trend (7) Optimizing for mobile



CONSISTENT EXPERIENCE ACROSS DEVICES

A solution that allows your website to adapt to any screen size and orientation



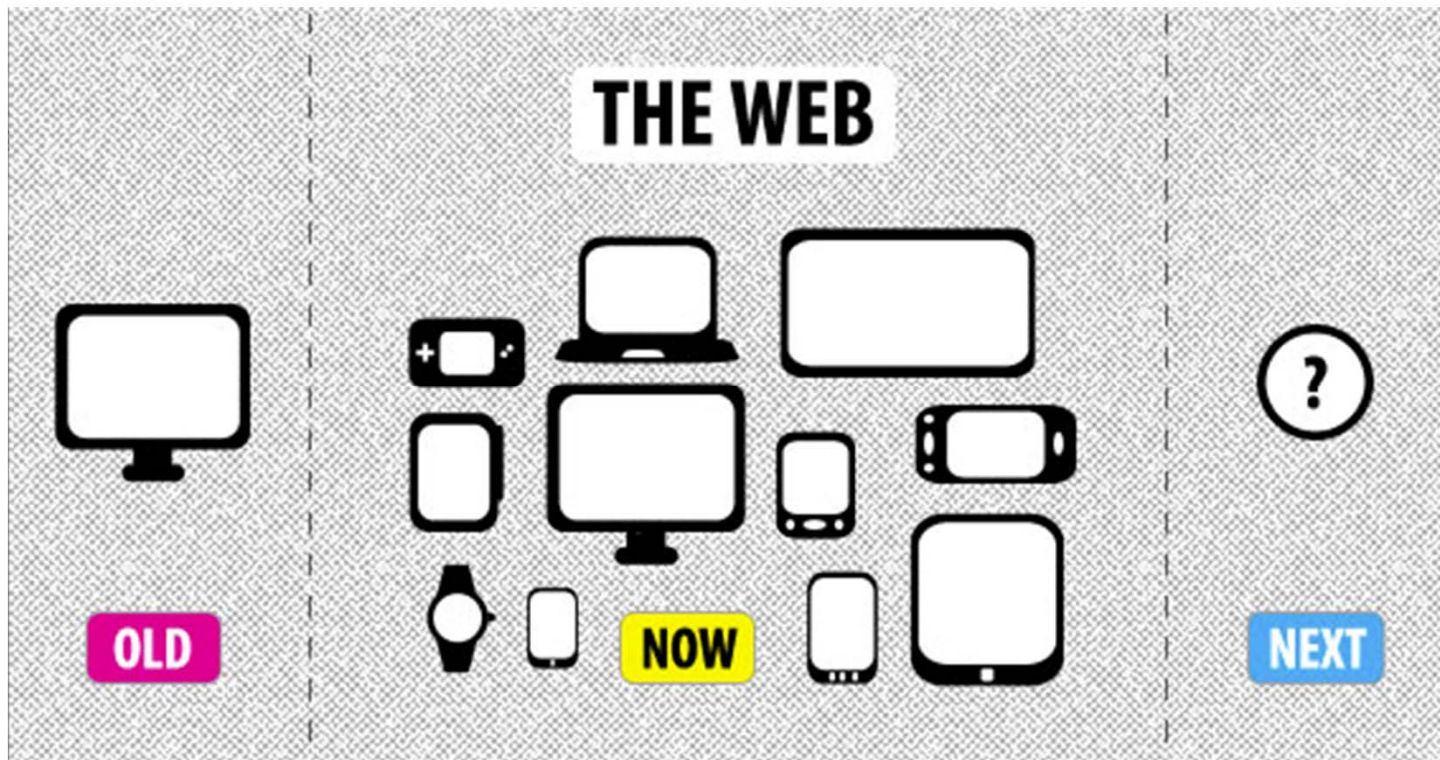
(7) Do a cost/benefit analysis



“What we really need in IT
is someone who has super powers.”



(7) What's next?





Tread (8) File analysis and segmentation

Your best prospects are already in your database.



Audience Data Mining



(8) Audience

- Bequest donors
 - Late 40s to late 50s, and 65-78
 - Loyal donors, lower amounts
- Gift annuity donors
 - Ages: mid-70s and older
 - Fiscally conservative
 - Loyal annual fund donors, usually very low amounts



(8) BatchCalcs

Thank you for your past support of the work we do at <<Charity_Name>>.

As a participant in our gift annuity program, I know that you are familiar with the benefits of a charitable gift annuity. Establishing an additional gift annuity in 2010 will not only provide you with fixed payments for life and an immediate charitable income tax deduction, but also with the satisfaction of knowing that you are enhancing the financial strength of the <<Charity_Name>>.

If you were to create another gift annuity this year with <<Amount>> in cash, you will receive a charitable income tax deduction of approximately <<Deduction>> and annual payments of <<Annual_Payment>> for the rest of your life. What's more, <<Taxfree_income>> of the payments you receive each year will be tax-free during the first <<Expected_return_years>> years.

You can also establish a gift annuity with publicly-traded securities or other appreciated property. You may be able to avoid tax on a significant portion of your capital gain in these assets when you use them to fund a gift annuity.

If you would like to establish another gift annuity with <<Charity_Name>>, or have any questions about how you can support our work, please call me at 888-497-4970 or email me at jfundraiser@pgcalc.com.



(8) Drip, drip, drip

- Planned gifts are prompted by life events—death, birth, marriage, health, travel, retirement, etc.
- Keep a regular cadence of marketing
- You never know when the time might be right



What's next?





Questions?





Still Have a Question?

Contact: Andrew Palmer,
Director of Marketing Services

E-mail: apalmer@pgcalc.com