

# PLANNED GIVING TOOLKIT\*

Secure  
your future



So much simpler  
than you might  
have imagined

Any organization  
can do it

Get started  
quickly



\* IT'S EASIER  
THAN YOU  
THINK

*How to leverage  
billions of dollars  
in Florida's  
communities*

ENDOW  
FLORIDA'S FUTURE  
*The Opportunity Is Now...The Good Lasts Forever*

A PROJECT OF FLORIDA PHILANTHROPIC NETWORK  
AND ITS COMMUNITY FOUNDATION MEMBERS

**Leading a nonprofit organization is never easy, especially these days. Leaders are faced with a world where doing more with less is an everyday occurrence. This Toolkit helps nonprofits leverage an overlooked opportunity: planned giving.**

**Planned gifts are helpful in two ways: they can help sustain your organization with guaranteed revenue streams, and provide peace of mind for all concerned. Planned gifts are a win-win: donors create a lasting legacy and so do the organizations they support.**

**This Toolkit provides the steps and turn-key templates you need to effectively, efficiently and confidently start a planned giving program.**

**You will be pleasantly surprised at how easy it is. Read on and begin today.**



# WHY NOW?

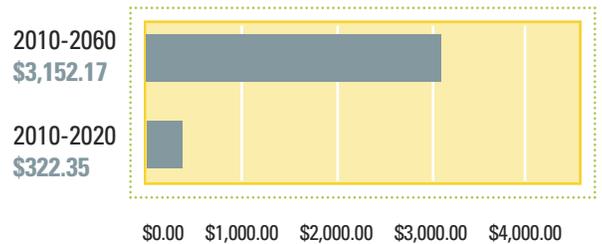
## \$322 BILLION IS WHY

During the next 10 years, Florida residents will transfer more than \$322 billion in assets between generations. By 2060, that figure is projected to reach \$3.2 trillion.

People don't have to be billionaires to make a planned gift; there are options for people with only a few personal assets. The result is philanthropic potential that exceeds any period in the region's history.

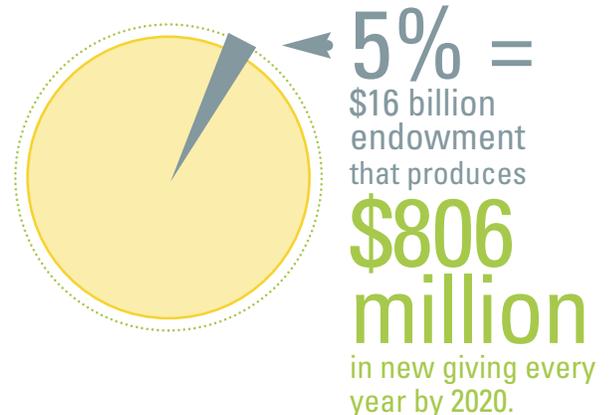
One planned gift of \$1 million could generate \$50,000 a year -- year after year -- for a nonprofit organization.

**Florida's Transfer of Wealth Opportunity**  
(\$ Billions)



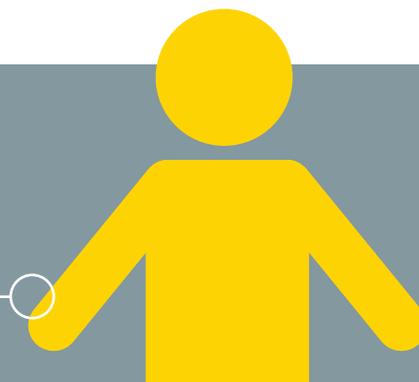
**Picture it. Just ONE planned gift could:**

- » Allow an all-volunteer organization to hire one full-time staff member
- » Fund the purchase of a building or office
- » Provide a revenue cushion during hard economic times
- » Feed more families, fund more arts programs, save more animals, shelter more homeless people...or make your mission a reality in your community



“It’s not worth my time...”

Actually, billions of dollars will change hands among Floridians over the next several years. Just a small piece of that can sustain your organization.



## WHAT IS PLANNED GIVING, ANYWAY ?

Planned giving is the transfer of assets (e.g., real estate, stock or life insurance) to a designated nonprofit organization during a lifetime or upon someone's passing. Usually this happens via a will or other written means. The giving is "planned" because often these assets are not liquid, have tax consequences or can be used to simultaneously generate income for donors.

### PLANNED GIVING BASICS

#### What is it?

Gifts of assets that require more planning

Gifts of assets that generate income for donors

Gifts created in perpetuity

#### Why is it important?

Gives your donors a unique way of supporting your organization

Provides potential tax income benefits for your donors

Takes advantage of current market trends

## WHY PLAN? BECAUSE STUFF HAPPENS

People in a variety of circumstances and life stages can benefit from a planned gift. Planned gifts are really just preparing for or reacting to life's events: a windfall from the sale of a business; the need to generate a revenue stream for elderly parents; the desire to counter an increase in one's tax liability; the birth of a child or grandchild; the establishment of a trust; annual planning; or the acquisition of new assets.

People have many opportunities to review their future giving plans, so it is never too soon to plant the seed for planned giving. Careful estate planning can also help people live a legacy as well as leave a legacy.

# THE TOOLS YOU NEED TO GET STARTED

Diversification of funding sources is essential as foundation and government money grows unreliable and requires more administrative time and support. Individual giving, then, is more important than ever — and planned giving is an essential component to long-term individual giving success. Individual donors rarely require the endless reporting and evaluation requirements of institutional funders. Start with the people you know...who know you best. One or two planned gifts can make a difference to many organizations.

The good news is that it doesn't take any money to start a program. Time is money, you say? The materials contained in the back of this Toolkit will save you time, so that you can spend it on building and deepening your relationships with donors. They will help you:

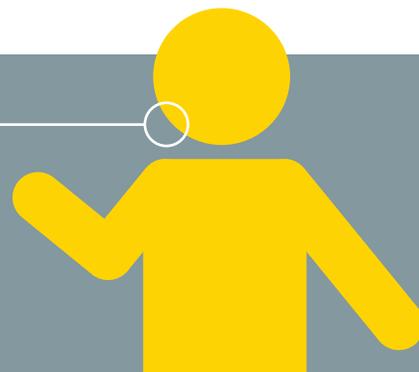
- » Engage your board of directors;
- » Deepen relationships with donors and make the "ask" easy;
- » Gain the confidence and language you need to start conversations with donors and follow through;
- » Set up planned giving information for websites, annual reports, etc.;
- » Customize a brochure that you can hand directly to donors.

**CASH** Residence  
Savings Account  
Undeveloped Land  
MONEY MARKET ACCOUNTS **REAL ESTATE**  
Stock Certificates  
LIFE INSURANCE POLICY Checking Account  
CDs **BONDS**

*Consult the templates in the back of this Toolkit for all the details you need to get started.*

“We don't know rich people...”

*You don't need to. Planned gifts are appropriate for donors of all means.*



# YOU DON'T HAVE TO BE AN EXPERT, JUST KNOW ONE

**Don't be intimidated by the legal and financial issues associated with different types of planned gifts. You don't have to be an expert, you just need to know one. There are resources for both your organization and your donor that offer experience in setting up different types of planned gifts.**

And these resources need not cost money. Some community foundations have established turn-key programs that cost nothing up front. Only a small fee is taken at the time that the asset is distributed to your organization. Likewise, there are many lawyers who will do this work pro bono for nonprofit organizations.

Program a couple of phone numbers into your cell phone, and you've done all you need to do. The experts will take it from there.

## **Community Foundation**

Community foundations are public charities that serve as nonprofit resources for local communities to encourage and benefit from philanthropy. Many community foundations can assist small nonprofits with the administration of different types of planned gifts, including charitable gift annuities and retained life estates. Generally, there are no fees associated with the start-up or disbursement of the fund. There is, however, a small fee (usually 1-2 percent of assets) for managing the fund. The partnership between the nonprofit organization and the community foundation begins at the moment a planned gift is being considered.

## **Volunteer Professional**

Another option is identifying an attorney willing to donate time on an as-needed and pro bono basis. Many lawyers have standardized language that can be provided to donors for writing planned gifts into wills and trusts. Often, organizations can call on their board members for this express purpose. Consider adding an estate-planning attorney to your board roster. The board member's time could be counted toward his or her annual financial contribution.

Partnering organizations have varying gift acceptance policies. Please consult with your partners about their parameters before engaging in a planned gift.

***For information about community foundations and other resources, please refer to the list provided in the back of the Toolkit.***

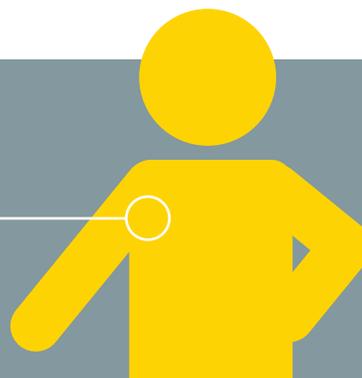
# SAMPLE COMMUNITY FOUNDATION PARTNERSHIP



COMMUNITY FOUNDATION		
1. Introductions	2. Gift Acceptance	3. Gift Management
Consults with you and donor	Finalizes gift agreement	If applicable, invests proceeds from asset sale
Evaluates your donor's goals	Ensures due diligence is performed, such as appraisals, title transfers, necessary inspections and other issues involving gift	Makes annual distributions from gift to your organization and other beneficiaries
Prepares gift proposal	Liquidates assets depending on gift type, provides gift acknowledgement record	Provides ongoing philanthropic consultation to you and your donor (if requested)
No cost to organization	No cost to organization	Approximately 1-2% of assets

“It’s too complicated...”

*The solution is to partner with experts and pro bono professionals who can set up and administer planned gifts for your organization.*



# SIX EASY STEPS TO CREATING A LEGACY SOCIETY

**leg-a-cy so-ci-e-ty** [leg-uh-see] [suh-sahy-i-tee], noun. An important key to planned giving. A legacy society is a group of individuals who convey their values by creating a future gift to your organization. It costs nothing to establish, deepens existing relationships, provides a means by which you can honor donors, and creates a sense of belonging for donor members. Best of all, it focuses the conversation on being an active donor; philanthropic giving that begins now and makes meaningful long-term contributions.



1.

## Create

Creating a legacy society is as easy as saying you have one. You can give it a specific name or not. No legal documents needed.



2.

## Honor

Determine what benefits you can offer legacy society members now and where you can post names, host an annual luncheon, etc.



3.

## Recruit

Make donors who have already pledged a planned gift founding members; reach out to donors with whom you have existing relationships.



4.

## Integrate

Integrate information about the new legacy society into all your materials. Share information with members about planned giving options that they may not even know exist.



5.

## Identify

Establish a board member as the chairperson or champion of the legacy society to build awareness among donors and ensure board support.



6.

## Work

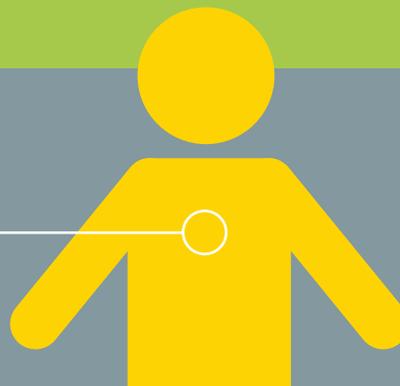
Work with a community foundation or other partner to set up specific gifts: life income gifts such as charitable gift annuities, charitable remainder trust or a retained life estate.



In short, a legacy society is a deferred form of individual giving. And if you think about it that way, it won't be so daunting. There is no legal paperwork and no cost associated with its creation or management. If you say you have one, then you do. If you have an individual giving program in place, a legacy society builds on and deepens your existing relationships.

**“It’s too expensive...”**

*Starting a legacy society costs absolutely nothing. Say you have one and you’re more than halfway there.*



# DON'T WORRY, THIS WON'T BE ON THE TEST

Your planned giving partner will know all the information on these pages, so you don't have to. However, if you are an overachiever who would like a better understanding of planned giving options, here are four types of gifts you can offer with the support of planned giving partners. For the rest of you, stop reading and turn the page.

## Charitable Gift Annuity

Ideal for people who want to give an asset to charity and receive a fixed income over the rest of their lives. After the donor makes the initial gift, the administrator, such as a community foundation or large nonprofit, makes fixed payments to the donor (or a designated beneficiary) for life. After the donor(s) passes away, the designated charity such as your nonprofit is the beneficiary of the remainder of the annuity.

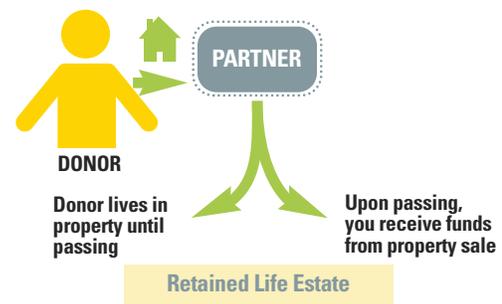


## Charitable Remainder Trust

Another option for people who want to give an asset to charity and receive income over the rest of their lives, or a term of years. After the donor makes the initial gift, the charity makes payments to the donor (or designated beneficiary) for life or the set period, based on a percentage of the asset's value. After the donor(s) passes away, the designated charity such as your nonprofit is the beneficiary of the remainder of the trust.

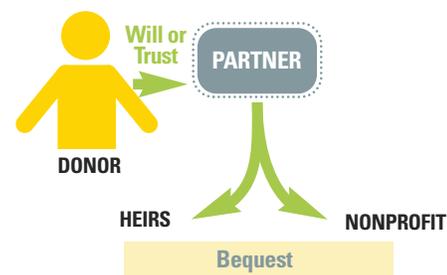
## Retained Life Estate

An option for people who own a home and intend to remain living there. Donor gifts property in return for an immediate tax deduction. Upon donor's passing, proceeds from sale of house are received by the designated charity such as your nonprofit.



## Bequest

Gift of any amount through a will, trust, life insurance policy or IRA. Such gifts often exist side-by-side with bequests to heirs or other organizations.



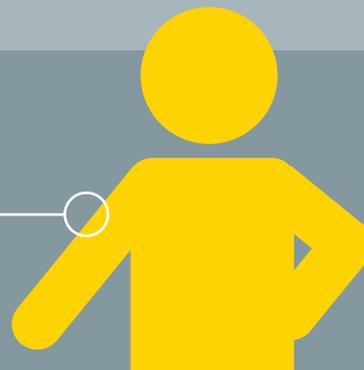
In addition to the satisfaction of a meaningful gift, planned gifts may offer immediate and long-term benefits. This chart provides a basic overview of four popular options.

GIFTS AT A GLANCE			
Gift Type	Basic Description	Benefits to Donors	Candidates for this Option
<b>Charitable Gift Annuities</b>	A gift of cash or stock in return for fixed payments to the donor for life  Upon passing, remainder is distributed to the charity	Security of a fixed income for life  Knowledge it is guaranteed by organization  Income tax charitable deduction in year of gift	Older donors who want to help a charity, have liquid assets (such as stocks, CDs, savings accounts)  Middle-aged donors who want to provide income for their parents or others
<b>Charitable Remainder Trust</b>	A gift of cash, stock, real estate or complex assets in return for variable payments (a % of gift)  Upon passing, remainder is distributed to the charity  Donor can make additional contributions over time	Annual income that can adjust over time; act as hedge against inflation  May avoid capital gains taxes on appreciated assets  Income tax charitable deduction in year of gift	Donors of any age, but generally middle-aged  Good for complex or appreciated assets
<b>Bequest</b>	A gift of house and/or property	Income tax charitable deduction in year of gift  Donor can continue to live in or use property	Older donors who own their own homes (including vacation homes)
<b>Retained Life Estate</b>	Gift of any amount through a will, trust, life insurance policy or IRA	Estate tax benefits	Donors of any age or income level

All donors and advisors should consult their tax advisors to properly determine the tax consequences of making a charitable gift.

“I’m not an expert...”

*You don’t have to be. Your planned giving partner will bring the financial and legal expertise your organization needs.*



# DON'T WANT TO TALK ABOUT DEATH? DON'T

Planned giving mistakenly gets a reputation as a taboo subject. You don't have to talk about death, dying or diverting assets from family heirs. A legacy society allows you to focus the conversation on the present — while still talking about the future. Legacy society members should be thought of as active donors. By using the language and tips provided in this Toolkit, you can feel confident in your ability to treat the matter with respect and dignity.

Here are four proven frames for starting a conversation about planned giving. Insert your cause or issue into these forward-thinking approaches:

## 1. Sustainability

"The needs of this community (hunger, homelessness, etc.) are ongoing. A legacy gift ensures that our organization will be around years from now to fulfill those needs."

## 2. Next Generation

"Legacy gifts ensure the well-being of future generations and serve as an inspiration to others to do the same."

## 3. Heritage

"You understand the importance of preserving our rich heritage and cultural identity. Legacy gifts provide donors a meaningful way to ensure this lasts decades into the future."

## 4. Personal Legacy

"Becoming a member of our legacy society ensures that the issues you care about and the values you cherish will be long remembered."

Planned giving conversations don't have to be one-on-one with donors. The elements of this Toolkit will help you start a dialogue at a higher level — introducing the idea of planned giving and reinforcing it in a variety of places: through mail and email, on your website, in customizable materials, annual reports and at events.



Individual Donor Continuum

## OK, NOW WHAT?

After reviewing this Toolkit, you should be ready and eager to start a legacy society. Start integrating planned giving into your development program today by using the customizable tools and language at the back of this folder.

### Engage Your Board Members

Use this Toolkit as a starting point.

### Personalize and Use the Enclosed Letters

Send electronic and/or hard copies by mail.

### Identify a Potential Partner From the “Planned Giving Resources” List

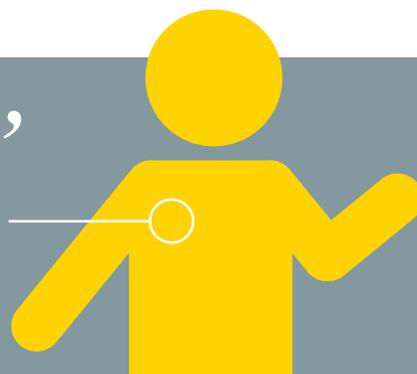
Visit their website and program their contact information into your cell phone.

So hurry — your share of \$5 billion is waiting!



“ I don’t know how to talk about death...”

*Start the conversation on a positive note by talking about encouraging sustainability, conserving cultural heritage and creating personal legacies.*



# PLANNED GIVING RESOURCES

You don't have to be an expert at planned giving, you just need to know one. There are resources for both your organization and your donor that offer experience in setting up different types of planned gifts. And these resources need not cost money. Some community foundations have established turn-key programs that cost nothing up front. Only a small fee is taken at the time that the asset is distributed to your organization. Likewise, there are many lawyers who will do this work pro bono for nonprofit organizations.

**If You Want a Community Foundation Partner -** Here is a list of local community foundations that may be able to provide support to local nonprofits and donors looking to fulfill a bequest or other planned gift.

**Cape Coral Community Foundation**  
[www.capecoralcf.org](http://www.capecoralcf.org)

**Central Florida Foundation**  
[www.cfcflorida.org](http://www.cfcflorida.org)

**Charlotte Community Foundation**  
[www.charlottecommunityfoundation.org](http://www.charlottecommunityfoundation.org)

**Community Foundation for Brevard**  
[www.cfbrevard.org](http://www.cfbrevard.org)

**The Community Foundation for Northeast Florida**  
[www.jaxcf.org](http://www.jaxcf.org)

**Community Foundation for Ocala Marion County**  
[ocalafoundation.org](http://ocalafoundation.org)

**Community Foundation for Palm Beach and Martin Counties**  
[www.cfpbmc.org](http://www.cfpbmc.org)

**Community Foundation of Broward**  
[www.cfbroward.org](http://www.cfbroward.org)

**Community Foundation of Collier County**  
[www.cfcollier.org](http://www.cfcollier.org)

**Community Foundation of East Central Florida**  
[www.cfecf.org](http://www.cfecf.org)

**Community Foundation of the Florida Keys**  
[www.cffk.org](http://www.cffk.org)

**Community Foundation of North Central Florida**  
[www.gnvcf.org](http://www.gnvcf.org)

**Community Foundation of North Florida**  
[www.cfnf.org](http://www.cfnf.org)

**Community Foundation of Northwest Florida**  
[www.cfnwf.org](http://www.cfnwf.org)

**Community Foundation of Sarasota County**  
[www.cfsarasota.org](http://www.cfsarasota.org)

**Community Foundation of South Lake County**  
[www.cflsc.org](http://www.cflsc.org)

**Community Foundation of Tampa Bay**  
[www.cftampabay.org](http://www.cftampabay.org)

**GiveWell Community Foundation**  
[www.givecf.org](http://www.givecf.org)

**Gulf Coast Community Foundation**  
[www.gulfcoastcf.org](http://www.gulfcoastcf.org)

**Indian River Community Foundation**  
[www.ircommunityfoundation.com](http://www.ircommunityfoundation.com)

**Key Biscayne Community Foundation**  
[www.keybiscaynecommunityfoundation.org](http://www.keybiscaynecommunityfoundation.org)

**Lake Community Foundation**  
[www.lakecommunityfoundation.org](http://www.lakecommunityfoundation.org)

**Manatee Community Foundation**  
[www.manateecf.org](http://www.manateecf.org)

**Martin County Community Foundation**  
[www.yourmccf.org](http://www.yourmccf.org)

**The Miami Foundation**  
[www.miamifoundation.org](http://www.miamifoundation.org)

**Pinellas Community Foundation**  
[www.pinellasccf.org](http://www.pinellasccf.org)

**Southwest Florida Community Foundation**  
[www.floridacommunity.com](http://www.floridacommunity.com)

**Sumter Sunshine Community Foundation**  
[www.sumterfoundation.org](http://www.sumterfoundation.org)

# IF YOU REALLY WANT TO LEARN THE BASICS

Across Florida, there are classes and workshops that address planned giving offered by universities and management support organizations including the Center for Nonprofit Management. In addition, many of these organizations provide referrals for pro bono, low-cost and market rate planned giving consultants and lawyers who can handle a planned gift. Learn more about these resources at [calfund.org/nonprofit-resources](http://calfund.org/nonprofit-resources).

**If You Want An Expert** - Consult a planned giving expert in your region.

**Brevard Estate Planning Council**  
[www.brevardepc.org](http://www.brevardepc.org)

**Central Florida Estate Planning Council**  
[cfepc.org](http://cfepc.org)

**East Coast Estate Planning Council**  
[eastcoastepc.org](http://eastcoastepc.org)

**Estate Planning Council of the Emerald Coast**  
[emeraldcoastestate.org](http://emeraldcoastestate.org)

**Estate Planning Council of the Fun Coast**  
[epcfuncoast.org](http://epcfuncoast.org)

**Estate Planning Council of Greater Miami**  
[www.epcmiami.org](http://www.epcmiami.org)

**Estate Planning Council of Lee County**  
[www.epclc.org](http://www.epclc.org)

**Estate Planning Council of Manatee County**  
[estateplanningcouncilofmanateecounty.org](http://estateplanningcouncilofmanateecounty.org)

**Estate Planning Council of Marion County**  
[www.marioncountyfloridaepc.org](http://www.marioncountyfloridaepc.org)

**Estate Planning Council of Naples**  
[epcofnaples.org](http://epcofnaples.org)

**Estate Planning Council of the Nature Coast**  
[www.naepc.org/membership/council/260](http://www.naepc.org/membership/council/260)

**Estate Planning Council of Northeast Florida**  
[www.nefepc.org](http://www.nefepc.org)

**Estate Planning Council of Northwest Florida**  
[epcnorthwestflorida.org](http://epcnorthwestflorida.org)

**Estate Planning Council of Polk County**  
[www.naepc.org/membership/council/59](http://www.naepc.org/membership/council/59)

**Greater Boca Raton Estate Planning Council**  
[www.bocaratonepc.org](http://www.bocaratonepc.org)

**Greater Naples Area Planned Giving Council**  
[www.naplespgc.org](http://www.naplespgc.org)

**Indian River Estate Planning Council**  
[www.naepc.org/membership/council/53](http://www.naepc.org/membership/council/53)

**Martin County Estate Planning Council**  
[www.mcepc.net](http://www.mcepc.net)

**Mid-Florida Estate Planning Council**  
[www.naepc.org/membership/council/484](http://www.naepc.org/membership/council/484)

**North Central Florida Estate Planning Council**  
[www.northcentralfloridaestateplanningcouncil.com](http://www.northcentralfloridaestateplanningcouncil.com)

**North Dade/South Broward Estate Planning Council**  
[ndsbepc.org](http://ndsbepc.org)

**North Suncoast Estate Planning Council**  
[estateplanninghelp.org](http://estateplanninghelp.org)

**Palm Beach County Estate Planning Council**  
[pbcepc.org](http://pbcepc.org)

**Partnership for Philanthropic Planning of Central Florida**  
[www.paccf.com](http://www.paccf.com)

**Partnership for Philanthropic Planning of Lee County, Inc.**  
[www.ppplee.org](http://www.ppplee.org)

**Pinellas County Estate Planning Council**  
[pinellascountypec.org](http://pinellascountypec.org)

**Planned Giving Council of Broward County**  
[www.PGCBroward.org](http://www.PGCBroward.org)

**Planned Giving Council of Indian River**  
[www.pgcir.org](http://www.pgcir.org)

**Planned Giving Council of Northeast Florida**  
[www.pgnefl.org](http://www.pgnefl.org)

**Planned Giving Council of Palm Beach County**  
[www.palmbeachplannedgiving.org](http://www.palmbeachplannedgiving.org)

**Southwest Florida Estate Planning Council**  
[www.swfepc.org](http://www.swfepc.org)

**Southwest Florida Planned Giving Council**  
[www.swflplannedgiving.com](http://www.swflplannedgiving.com)

**Suncoast Estate Planning Council**  
[suncoastepc.org](http://suncoastepc.org)

**Tallahassee Regional Estate Planning Council**  
[trepc.org](http://trepc.org)

**The Tampa Bay Estate Planning Council**  
[www.tbepc.org](http://www.tbepc.org)

**Volusia County Trusts and Estates Planning Council**  
[www.naepc.org/membership/council/381](http://www.naepc.org/membership/council/381)

SAMPLE LEGACY SOCIETY INVITE LETTER – ALL AUDIENCES

(To be imprinted on NPO's letterhead)

(DATE)

Mr./Mrs. (INSERT NAME)

(ADDRESS)

(CITY/STATE/ZIP)

Dear (INSERT NAME):

Because of your belief in our commitment to (INSERT SHORT MISSION HERE), I want to personally invite you to become a member of (INSERT ORGANIZATION NAME)'s Legacy Society, (INSERT SOCIETY NAME IF THERE IS ONE). The society is composed of generous and forward-thinking donors who will support our long-term success through a planned gift. It's easy to do. And you don't have to be a billionaire to do it. While cash contributions are always appreciated, there are other creative and flexible giving options that can benefit you and (INSERT ORGANIZATION NAME). Consider, for example, donating real estate, stocks, or other assets in return for a series of regular payments. Many planned giving options offer generous tax benefits as well.

Whether it is naming (INSERT ORGANIZATION NAME) as the beneficiary of a life insurance policy or gifting other liquid or non-liquid assets, we encourage you to consult with your financial advisor to discuss the options. The enclosed materials provide an overview of planned giving options. More information is also available on our website, (INSERT LINK). No matter what you choose to give, you will be honored through:

- (EXAMPLE BENEFIT #1: Recognition on our website)
- (EXAMPLE BENEFIT #2: Tributes in publications such as X, Y & Z)
- (EXAMPLE BENEFIT #3: Invitation to an annual (INSERT SOCIETY NAME) luncheon)

You need not be wealthy to leave a legacy. Ensure the sustainability of our organization in a way that makes your core values known to others. Generations to come will benefit from your gift. Your support of our mission will be long remembered and serve as an inspiration to others.

Warm regards,

(NAME)

(TITLE)

SAMPLE LEGACY SOCIETY CHARTER MEMBER LETTER

(To be imprinted on NPO's letterhead)

(DATE)

Mr./Mrs. (INSERT NAME)

(ADDRESS)

(CITY/STATE/ZIP)

Dear (INSERT NAME):

I want to personally thank you for your ongoing support of (INSERT ORGANIZATION NAME). Your generous promise of a planned gift helps ensure the long-term sustainability of our mission to (INSERT SHORT MISSION).

As a forward-thinking donor, you will now become a founding member of our new legacy society, (INSERT SOCIETY NAME IF THERE IS ONE). Throughout the year we will honor you and the other members of the legacy society through (CUSTOMIZE FOR YOUR ORGANIZATION):

- (EXAMPLE BENEFIT #1: Recognition on our website)
- (EXAMPLE BENEFIT #2: Tributes in publications such as X, Y & Z)
- (EXAMPLE BENEFIT #3: Invitation to an annual (INSERT SOCIETY NAME) luncheon)

Thank you again for your support of our mission now and in the future. Your generosity and philanthropic legacy will long be remembered.

Warm regards,

(NAME)

(TITLE)

SAMPLE LETTER FOR CURRENT DONORS (NON-PLANNED GIFTS)

(To be imprinted on NPO's letterhead)

(DATE)

Mr./Mrs. (INSERT NAME)

(ADDRESS)

(CITY/STATE/ZIP)

Dear (INSERT NAME):

Thank you for your ongoing support of (INSERT ORGANIZATION NAME). Your donations advance our commitment to (INSERT SHORT MISSION HERE). I want to personally invite you to become a member of (INSERT ORGANIZATION NAME)'s exciting new legacy society, (INSERT SOCIETY NAME IF THERE IS ONE).

The society is composed of generous and forward-thinking donors who will support our long-term success through a planned gift. It's easy to do. And you don't have to be a billionaire to do it. While cash contributions are always appreciated, there are other creative and flexible giving options that can benefit you and (INSERT ORGANIZATION NAME). Consider, for example, donating real estate, stocks, or other assets in return for a series of regular payments. Many planned giving options offer generous tax benefits as well.

Whether it is naming (INSERT ORGANIZATION NAME) as the beneficiary of a life insurance policy or gifting other liquid or non-liquid assets, we encourage you to consult with your financial advisor to discuss the options.

The enclosed materials provide an overview of planned giving options. More information is also available on our website, (INSERT LINK). No matter what you choose to give, you will be honored through:

- (EXAMPLE BENEFIT #1: Recognition on our website)
- (EXAMPLE BENEFIT #2: Tributes in publications such as X, Y & Z)
- (EXAMPLE BENEFIT #3: Invitation to an annual (INSERT SOCIETY NAME) luncheon)

You need not be wealthy to leave a legacy that makes your core values known to others. Support our long-term success.

Warm regards,

(NAME)

(TITLE)

SAMPLE PLANNED GIFT CONFIRMATION LETTER (THANK YOU)

(To be imprinted on NPO's letterhead)

(DATE)

Mr./Mrs. (INSERT NAME)

(ADDRESS)

(CITY/STATE/ZIP)

Dear (INSERT NAME):

I want to personally thank you for your ongoing support of (INSERT ORGANIZATION NAME). Your generous promise of a planned gift helps ensure the long-term sustainability of our mission to (INSERT SHORT MISSION).

I would also like to take this opportunity to welcome you as a member of our new legacy society, (INSERT SOCIETY NAME IF THERE IS ONE). The legacy society is composed of forward-thinking donors like you who have opted to make their core values known to future generations through one of the many different types of planned gifts.

To show our ongoing appreciation, we will honor you and the other members of the legacy society throughout the year with (CUSTOMIZE FOR YOUR ORGANIZATION):

- (EXAMPLE BENEFIT #1: Recognition on our website)
- (EXAMPLE BENEFIT #2: Tributes in publications such as X, Y & Z)
- (EXAMPLE BENEFIT #3: Invitation to an annual (INSERT SOCIETY NAME) luncheon)

Thank you again for your support of our mission now and in the future. Your generosity and philanthropic legacy will long be remembered.

Warm regards,

(NAME)

(TITLE)

## SAMPLE LANGUAGE TEMPLATE

(To be used on NPO's website or other publications)

You do not need to be wealthy to leave a legacy. Make your core values known by joining the (INSERT ORGANIZATION (ORG) NAME HERE) and making a planned gift to (INSERT ORG NAME). Members of our legacy society are generous and forward thinking donors who will support our long-term success and be long remembered.

In addition to supporting our work through your generous cash donations, here are other ways you can contribute to the sustainability of (INSERT ORG MISSION) in the long term. Many of these options are a win-win for the donor and the organization. We encourage you to consult with your financial advisor to discuss the tax implications of these options.

### Bequests

One of the easiest ways to help involves simply naming (INSERT ORG NAME) as a beneficiary in your will and living trust. A bequest may be for a particular dollar amount or percentage of your estate. Estate tax savings may be significant.

### Life Insurance Policy and Retirement Assets

Often overlooked by donors, naming (INSERT ORG NAME) as a partial beneficiary of these assets can provide support for the organization.

### Life Income Gifts

Life income gifts allow you to leave a gift in the care of (INSERT ORG NAME), while earning income for yourself during your lifetime. The two most popular life income gifts are charitable remainder trusts and charitable gift annuities.

### Complex Gifts

If you are a business owner, own real property or have any other type of complex asset, giving options exist that can both help (INSERT ORG NAME) and benefit your family financially.

Legacy society members become a special part of the (INSERT ORG NAME) donor family. They are also honored with (CUSTOMIZE FOR YOUR ORGANIZATION):

- Recognition on our website
- Tributes in publications such as (XYZ)
- An annual (INSERT SOCIETY NAME) luncheon

Contact XXXXXXXX to discuss membership in the (INSERT NAME OF Legacy Society).  
(TELEPHONE # AND EMAIL).

Endow Florida's Future is a project of Florida Philanthropic Network and its community foundation members. The underlying research - Wealth in Florida and Its Counties - was conducted by the Center for Rural Entrepreneurship at the Rural Policy Research Institute, with funding from 11 Florida foundations and coordination by FPN's 28 community foundation members.

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Florida Philanthropic Network is a statewide network of philanthropic organizations working to build philanthropy to build a better Florida.