



What Your Boss Really Needs to Know About Gift Planning

Wednesday, May 13

PRESENTED BY

Scott Lumpkin

Vice Chancellor of University Advancement
University of Denver

What Your Boss Really Needs to Know
About Gift Planning

Presenter



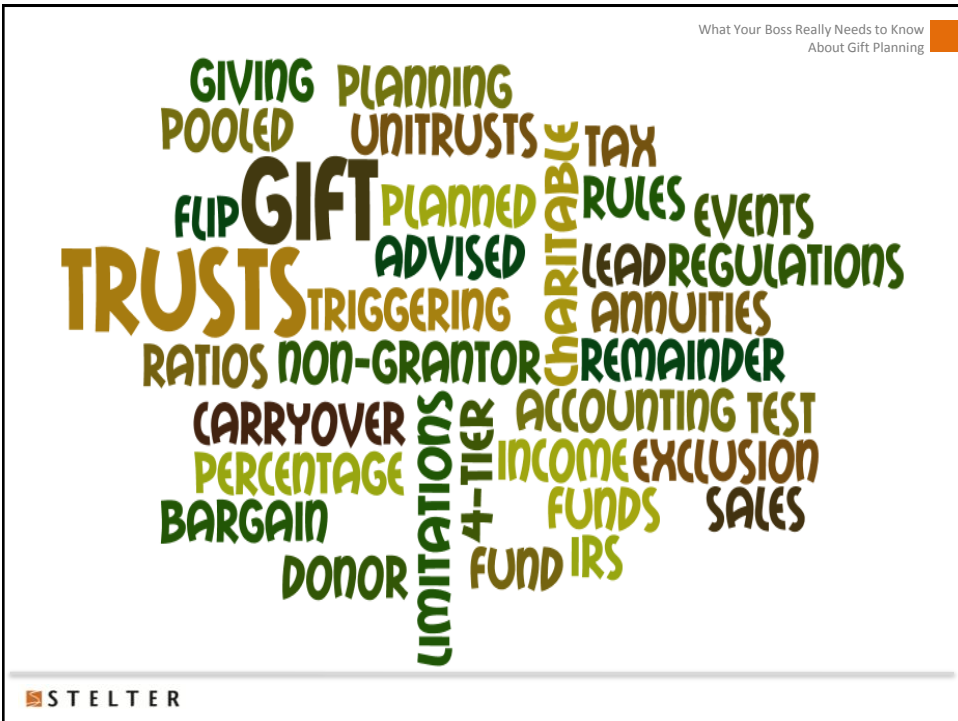
Scott Lumpkin

Vice Chancellor of University Advancement
University of Denver

- Prior to current role, led DU's gift planning program for more than twenty-five years
- Under his leadership DU successfully completed \$490 million ASCEND Campaign in 2014
- Instrumental in DU's previous \$273 million campaign that transformed the campus in the 1990s
- Past board member of the National Committee on Planned Giving
- Directed national research projects focused on planned giving including NCPG's landmark nationwide demographic survey of donors: *Planned Giving in the United States*
- BS in Mathematics and MBA from the University of Denver



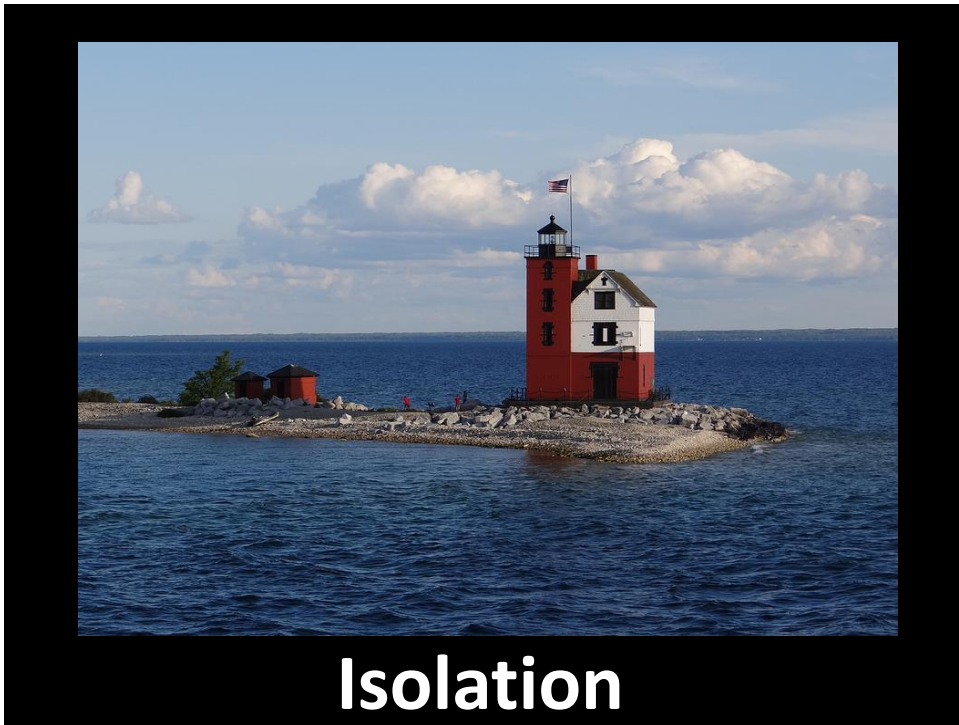
Audience Poll



What Your Boss Really Needs to Know About Gift Planning

Donor
Non-Grantor
Barga
Tax
Charitable
Trusts
Funds
Remainder
Carryover
Gift
Income
Annuities
FLIP
Accounting
Test
Regulations
Percentage
Exclusion
Giving
Pooled
Limitations
Tier
otios
ales
Planning
Four
Advised
Rules Planned
Lead Unitrusts Fund

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Tax Regulations



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Ill-Equipped Leaders



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The Missing Piece



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What Your Boss Really Needs to Know
About Gift Planning

Results of Ineffective, Misinformed Leadership

- + Limited success & productivity
- + Turnover
- + Failure to reach potential

**YOU CAN'T BUILD
A LONG TERM
FUTURE
ON SHORT TERM
THINKING.**
-BILLY COX

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Stereotypes
Opportunity Cost
Limited Success **Dysfunctional Teams**
Donor Dissatisfaction

What Nonprofit Leaders

Don't Understand

About Gift Planning

The **Basics** About Gift
Planning

Conversational

Gift Planning

**Managing Gift
Planning** Programs

Why they

Don't Know More

About Gift Planning

What Nonprofit Leaders

Don't Need to Know

About Gift Planning

What Your Boss Really Needs to Know
About Gift Planning

Tax Regulations
Percentage Limitations
Exclusion Ratios
Non Grantor Lead Trusts
FLIPTrust Triggering Events
Four Tier Accounting
Qualified Appraisals IRC Sec 664
Grantor Lead Trusts
Net Income Trusts
Bargain Sales

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5 Things Your Boss
Really **Needs to Know**
About **Gift Planning**

What Your Boss Really Needs to Know
About Gift Planning

#1 How to Talk About Gift Planning



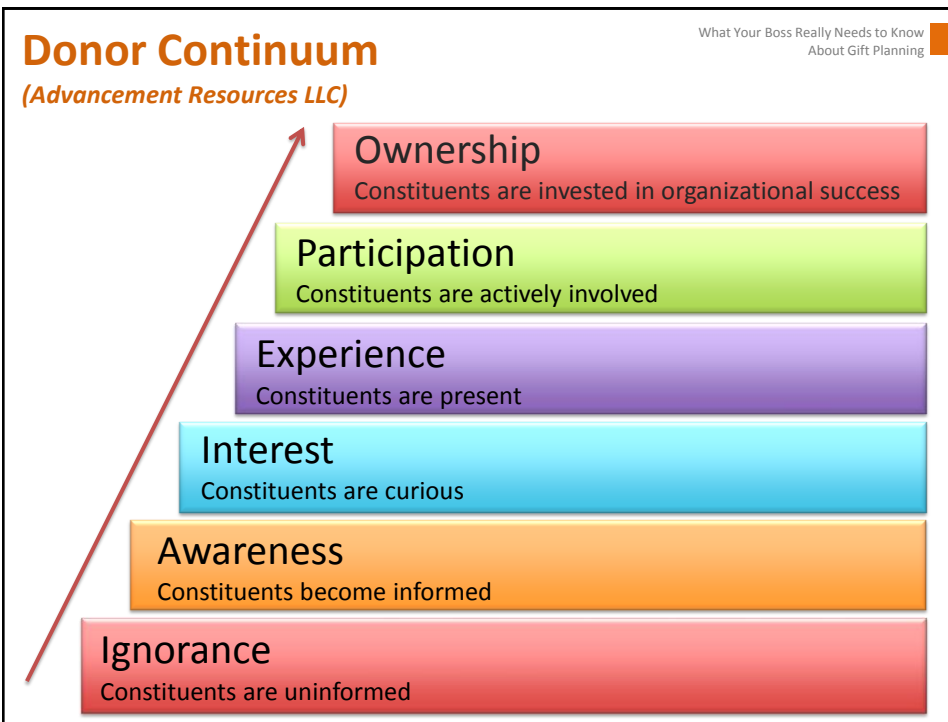
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What Your Boss Really Needs to Know
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#2 The Truth About Gift Planning Donors

Loyalty
Involved Philanthropic Relationships Matter
Focused On Impact Age
Millionaires Next Door
Mission Matters
Net Worth

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What Your Boss Really Needs to Know About Gift Planning

#3 How to Recruit and Manage Gift Planners

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What Your Boss Really Needs to Know
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#4 How to Position Gift Planning



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What Your Boss Really Needs to Know
About Gift Planning

#5 What Gift Planning Can Do for Them



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What Makes Gift Planning Different

- + It's Not About Techniques or Taxes
- + It's All About Relationships
- + It's All About Impact

Where to Start

- + Include them on a planned gift
- + Encourage collaboration on planned gifts
- + Review counting and recognition policies
- + Tailor performance measures to encourage planned gifts
- + Incorporate gift planning into portfolios
- + Leverage existing resources to promote gift planning at no additional cost

What Your Boss Really Needs to Know
About Gift Planning

Redefining Planned Giving

REDEFINE

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What Your Boss Really Needs to Know
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Changing the Culture... It's All About Culture



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Q&A

Scott Lumpkin
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Additional Questions

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Thanks!