

Data to Design II

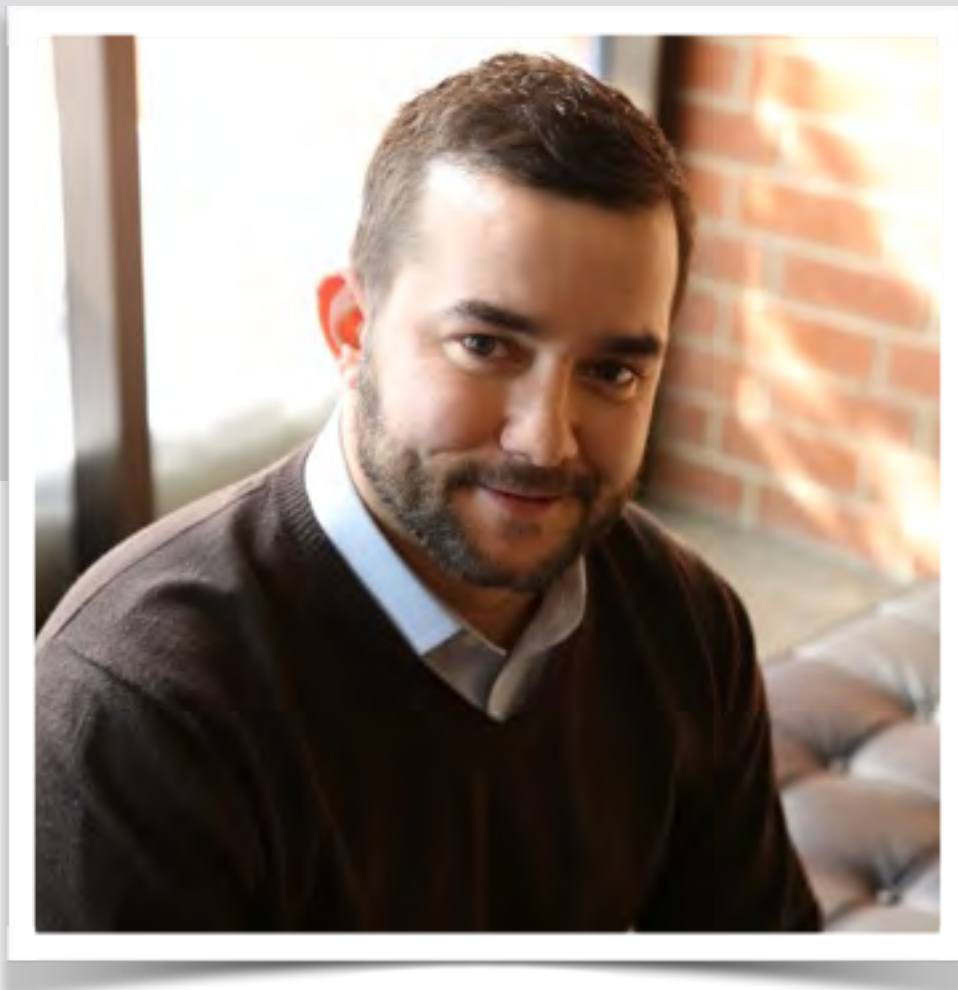
Using Research To Drive The Creative Process



Cheryl Sturm

Director of Marketing, The Stelter Company

- Over 30 years of global communications and marketing experience
- Responsible for the overall market positioning of The Stelter Company brand
- Prior to joining Stelter, worked for 10 years in the biotech industry; responsible for launching new ingredient products in North America, Japan, Korea and Indonesia
- Worked with Young & Rubicam Advertising's Midwest office as Senior Vice President—Account Group Director, building brands for clients such as John Deere Credit, Blue Cross Blue Shield and Lotto America
- B.A. in Secondary Education with an emphasis in economics from Westmar College



Zach Christensen

Creative Director, The Stelter Company

- Over 10 years of design and creative direction experience for non profit's
- Responsible for Stelter's 25 person creative group
- Prior to joining Stelter, worked as the Art Director for Trilix, a Des Moines based marketing communication, advertising and interactive agency, serving local and national brands including, EMC Insurance, Clow Valve Co., Stine Seeds and our local favorite The Iowa State Fair.
- Ensures the creative of all Stelter print and online components capture the look and feel of each nonprofit's brand and mission.
- B.F.A in Graphic Design from Iowa State University

Natural Marketing Institute's Healthy Aging Database[®]

Methodology

- Annual quantitative study since 2005, now with 11 years of trended data
- April 2016 research of U.S. adults comprised of:
 - 3,465 general population sample
 - 38% Millennials
 - 20% Gen X
 - 34% Boomers
 - 7% Matures
- Balanced to U.S. Census data across key demographics:
 - Gender, age, income, education, region and race
- Statistically significant at the 95% confidence level to +/- 1.5%
- Conducted via online research methodology

Generation Descriptions



Millennials
Born 1977-1998
Ages 19-39



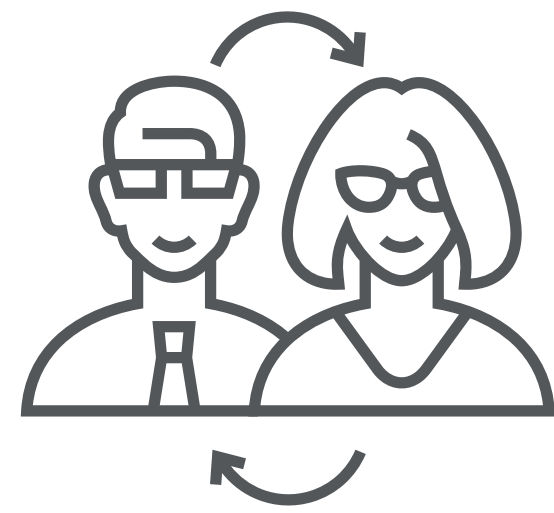
Gen X
Born 1965-1976
Ages 40-51



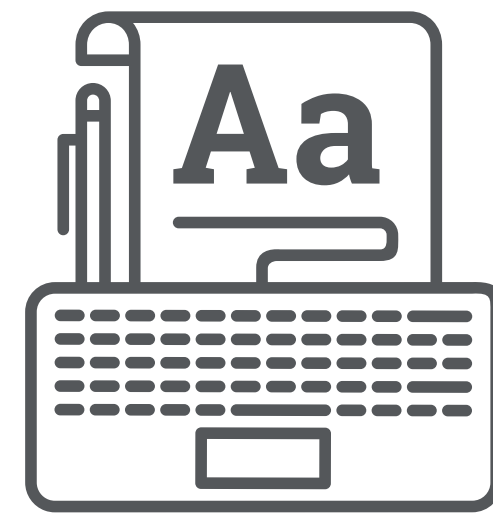
Boomers
Born 1946-1964
Ages 52-70



Matures
Born 1900-1945
Ages 71+



Audience



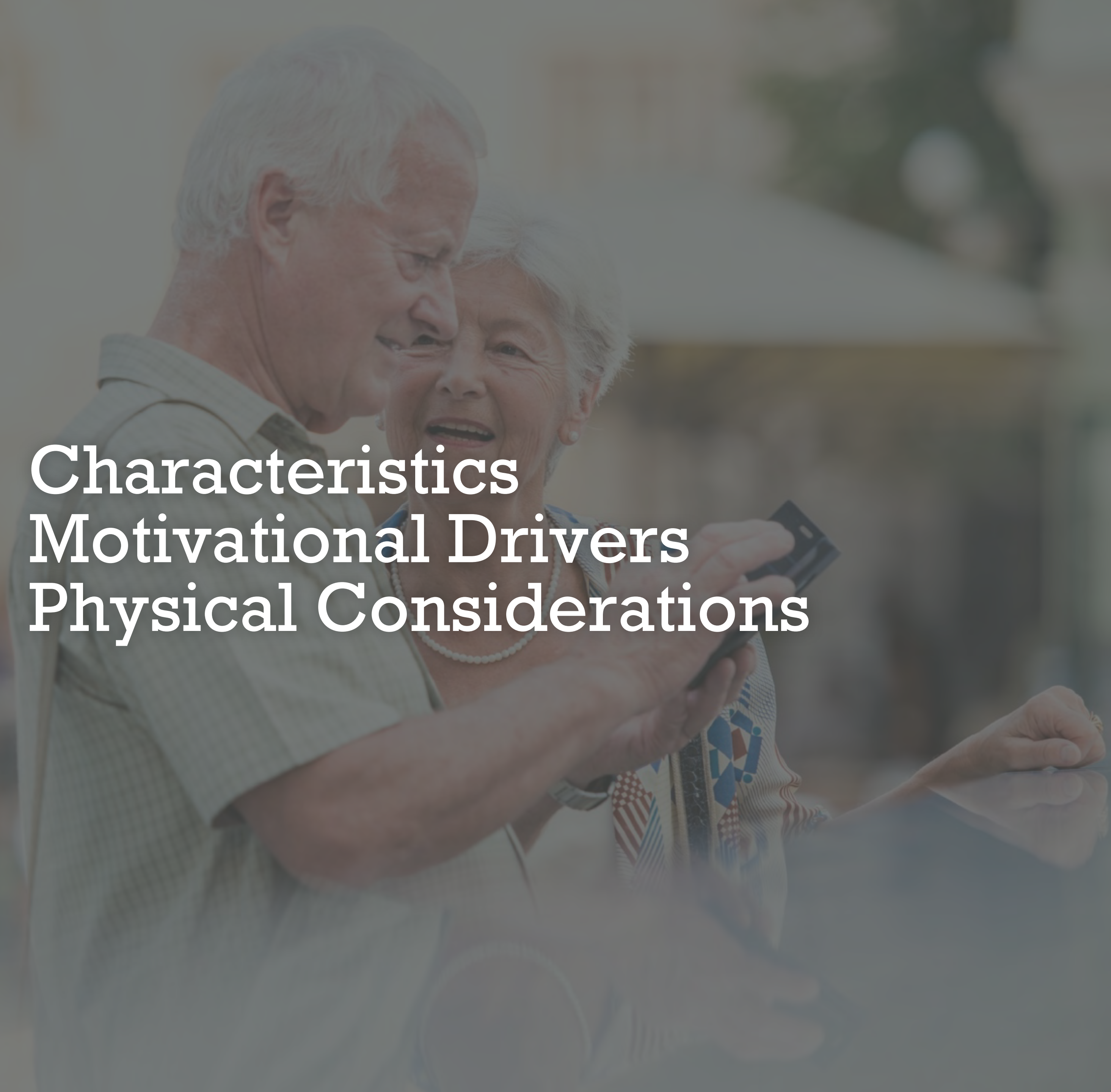
Fonts

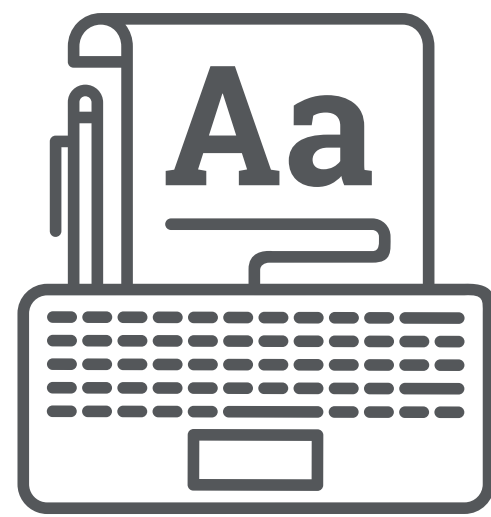


Images



Characteristics
Motivational Drivers
Physical Considerations





Fonts

Serif vs. Sans Serif
Readability
Copy Clarity



Serif

Garamond

Georgia

Palatino

Times Roman

Sans Serif

Helvetica

Arial

Futura

Myriad



Serif

Font: Georgia Size: 25 pt.

Lorem ipsum dolor sit amet, eu sed debet imperdiet, cu has quem summo comprehensam, te vis dicunt lucilius prodesset. Ad clita corpora eam, per cibo nonummy invidunt et. Vix molestiae euripidis comprehensam eu, ad rebum decore his. In autem oratio vocibus pro.

Sans Serif

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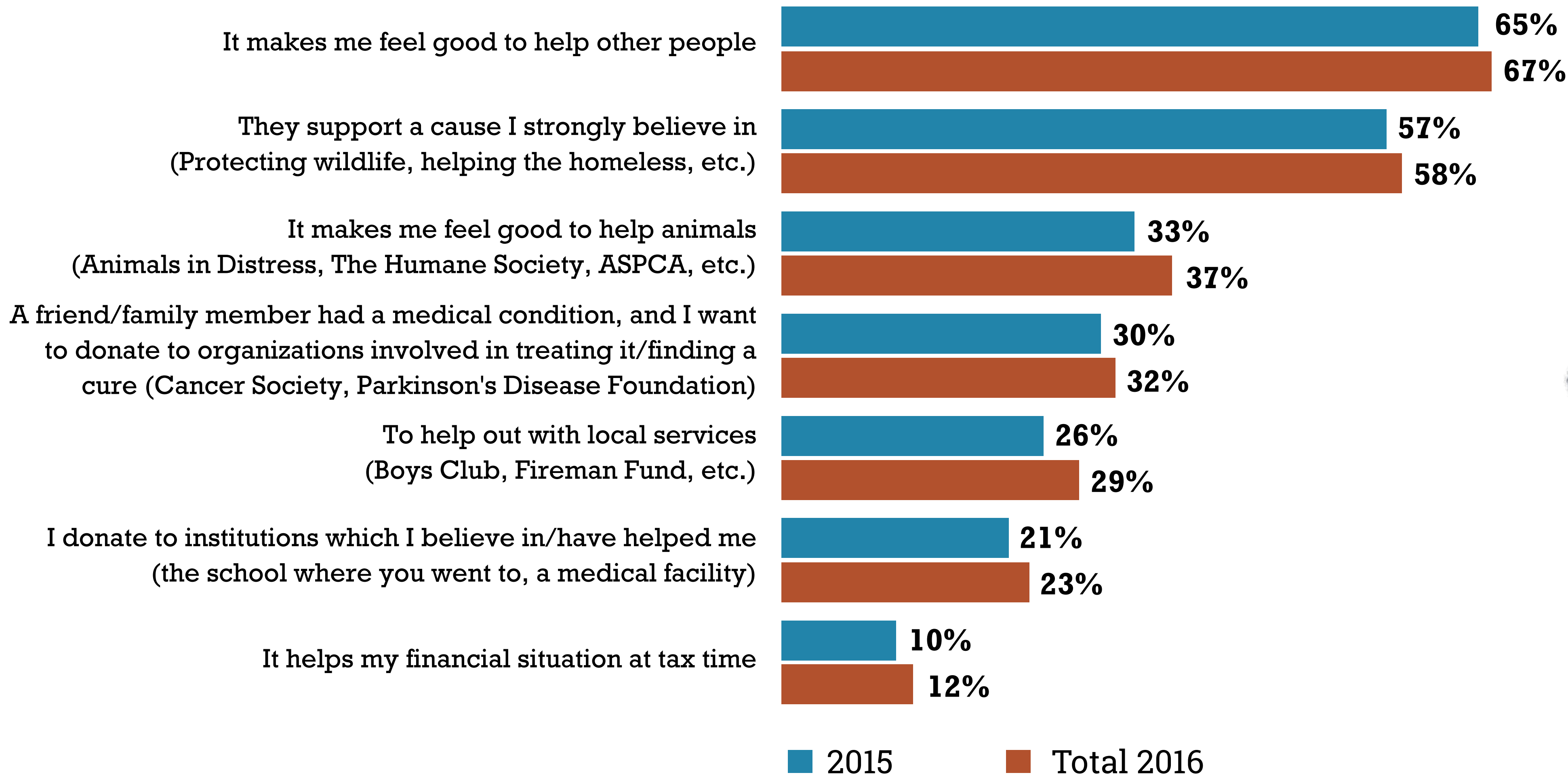


Organization Specific
Real People
Emotional Images



Dig Into The “Why” to Target Your Messaging

% donors indicating why they donate money to charitable organizations



LEGACY

PLANNING FOR TODAY AND TOMORROW :: WINTER 2015

Inside:

Give a Gift That
Keeps Children
Where They Belong
— in School

— PAGE 2 —

Put Children First

— PAGE 4 —



Thanks to a UNICEF-provided mobile classroom, 7-year-old Amanda Zuleide Maldonado continued attending school even when flooding forced her family to flee their home in Paraguay.

A Place to Continue Learning

UNICEF's Mobile Classrooms Keep Children in School Amid Disasters

Amanda Zuleide Maldonado is an avid student. If she could, Amanda would even go to school on Sunday, her grandmother says.

“My dream, when I grow up, is to be a professional — to help my people.”

— Amanda Zuleide Maldonado

To hear this 7-year-old speak about her passion for learning and

her love of going to school is inspiring. “My dream, when I grow up, is to be a professional — to help my people.”

It wasn't that long ago that Amanda's future educational pursuits were in jeopardy. When heavy rains caused the Parana and Paraguay rivers to flood in the summer of 2014, an estimated 245,000 Paraguayans fled their homes in search of a safer, drier environment. Among the displaced were 145,000 children, including Amanda.

Back to School

Despite living miles from her old classroom, Amanda was still able to attend school. With UNICEF's support, Paraguay's Ministry of Education installed 20 mobile classrooms, accommodating 2,800 students.

The temporary settlement where Amanda's family relocated received one of these mobile classrooms. The school consisted of students from three separate institutions. Full-time teachers led classes that

(Continued on Page 3)

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(Continued on Page 3)



Watch a short video about Amanda's story at unicef.org/education/paraguay_74786.html

Go Online

Discover a Tax-Smart Plan for Your Retirement Accounts

Visit unicef.usa.planmylegacy.org/retirement_accounts to download our informative guide about how you can use your retirement plan assets to provide hope and opportunity to children and families caught in crises around the world.

(Continued from Page 1) combined several levels, with children ranging in age from preschool to Grade 6.

Disasters such as the torrential rain and subsequent flooding in Paraguay in the summer of 2014 don't make front-page news, but they disrupt and uproot children's lives all the same. UNICEF knows that getting children back to school in times of crises provides them with a routine and optimism that life will become normal once again.

It's also critical because research shows that children who are absent from classrooms for extended periods are increasingly less likely to return to school.

That's why UNICEF partners with governments and other agencies to deliver a variety of educational tools, such as the mobile classroom Amanda and her classmates attended, that quickly return children to school during and after emergencies.

Amanda and her family know that education is the key to a brighter future. Even though the family's temporary new home — a 3-square-meter room made of wooden boards and corrugated iron — still didn't keep them completely dry, its location enabled Amanda to continue her education, which demonstrates how people still find a way to learn, no matter what. ■

Your support is vital to UNICEF's work of ensuring that vulnerable children like Amanda receive a quality education. Contact Karen Metzger at (866) 486-4233 or email kmetzger@unicefusa.org to learn how you can use your estate to provide hope and opportunity to children affected by crises around the world.

Provide Children a Safer Tomorrow

Estate planning is an opportunity to create a legacy of hope for children and families that you and your loved ones can feel good about. Our FREE guide *Plan Your Legacy to Protect Children's Futures* breaks the estate planning process into simple steps. Return the enclosed reply card today to request your copy.

Plan Your Legacy to Protect Children's Futures



**CELEBRATING TRADITION.
BUILDING FUTURES.**

Summer 2015

Rediscovering Happiness With the Help of LSI

For 11-year-old Jaden, school days are filled with learning and friends, as it should be.

But it wasn't always that way.

Last year, Jaden went to the emergency room three times in three weeks, saying that he wanted to die or harm himself.

"He told me that's just what he says when he's upset, but as a mom I had to take that seriously," says Jaden's mom, Lani.

A Tough Decision

When Jaden began having behavioral health issues in kindergarten, his family and school worked together to find him counseling and support. But after those visits to the hospital, Jaden's parents knew he needed more intensive care. They made the difficult decision to place him at LSI's Beloit Residential Treatment Center in Ames.

"It was hard not to see him every day, but I could feel comfortable knowing that he was getting the right kind of care and counseling. Getting the help he needed was worth it," Lani says.

Showing Improvement

During his four months at Beloit, Jaden learned skills to communicate his feelings, cope with frustration, make friends and do better at school.

"Before he needed a classroom aide all the time," says Lani. "He gradually moved away from having an aide for behaviors to just academics, and now it's not even that much. He used to go to a behavior intervention room for lunch and recess, but now he goes to the cafeteria with his friends and has no problems."

Continued on Page 3

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— Jaden's mother



Jaden lives a happy life using coping skills he learned through LSI's residential treatment program.

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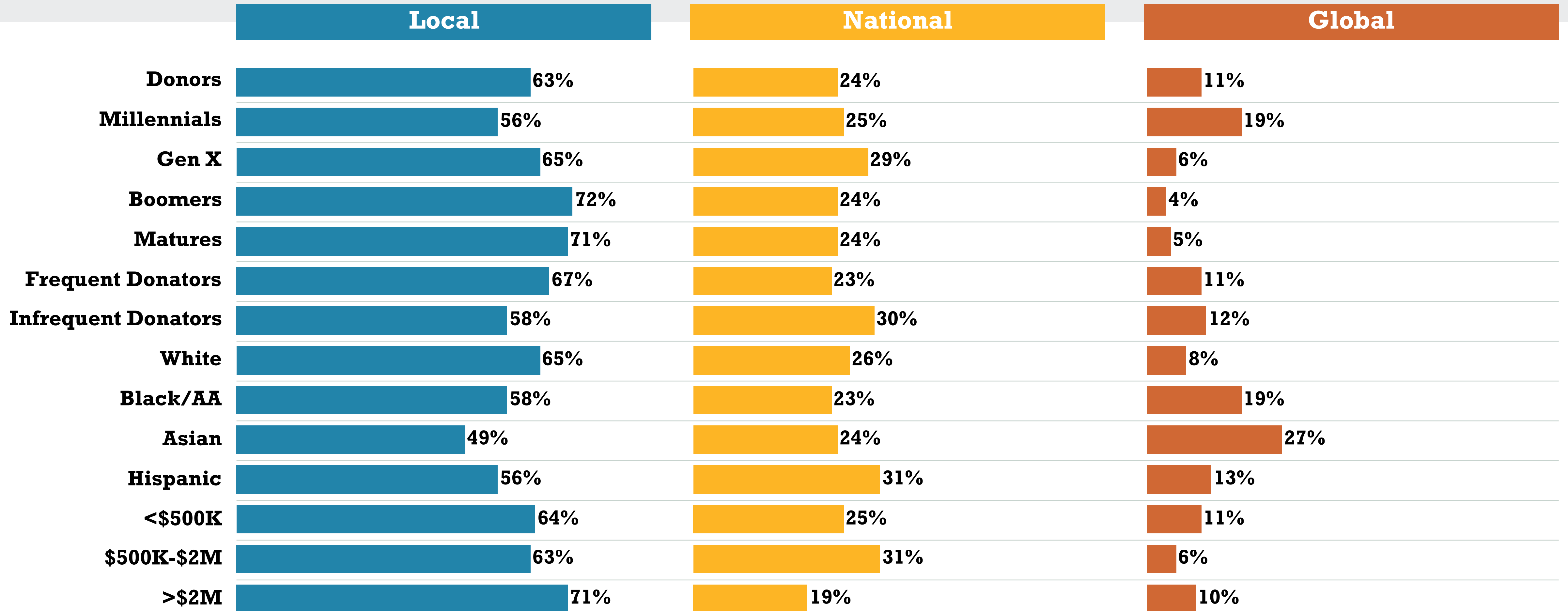
— Jaden's mother



Jaden lives a happy life using coping skills he learned through LSI's residential treatment program.

Donors Like to Keep It Close to Home

% donors indicating which type of organization they prefer to donate to





12404 Jackson, OH 45640

Tel 740-286-6685
 Fax 740-286-6686
 seohiofoodbank.org

Feed the Next Generation in Pike County

Dear Julie,

Thanks to you, the Southeastern Ohio Food Bank served more than 17,000 people in your neighborhood.

Unfortunately, there's much more to be done, and we need your help to ensure we can be there to feed families in Pike County who are struggling.

In this issue of our newsletter, you'll learn about one of the simplest ways to extend your support into the future. A gift in your will or living trust is a flexible ways to help continue the fight to end hunger in Pike County.

Thank you for all you do to support the Southeastern Ohio Food Bank. Together we can improve the lives of Ohioans by ending hunger.

Sincerely,

Mary Anderson

Mary Anderson
 Planned Giving Officer

P.S. Return the enclosed survey to learn more about how you can help ensure that children in Pike County don't go to school hungry.



23,000

people in Pike County
 don't have enough
 food to eat.



1 million

meals missed by hungry
 families in the region.

**7,000 OF THOSE
 ARE CHILDREN**



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Mary Anderson

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Planned Giving Officer

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Feed the Next Generation in Ross County

Dear Douglas,

Thanks to you, the Southeastern Ohio Food Bank served more than 20,000 people in your neighborhood.

Unfortunately, there's much more to be done, and we need your help to ensure we can be there to feed families in Ross County who are struggling.

In this issue of our newsletter, you'll learn about one of the simplest ways to extend your support into the future. A gift in your will or living trust is a flexible ways to help continue the fight to end hunger in Ross County.

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Mary Anderson

Mary Anderson
Planned Giving Officer

P.S. Return the enclosed survey to learn more about how you can help ensure that children in Ross County don't go to school hungry.

12404 Jackson, OH 45640

Tel 740-286-6685
Fax 740-286-6686
seohiofoodbank.org



35,000

people in Ross County
don't have enough
food to eat.



3 million

meals missed by hungry
families in the region.

**17,000 OF THOSE
ARE CHILDREN**



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Feed the Next Generation in Jackson County

Dear Eric,

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Thank you for all you do to support the Southeastern Ohio Food Bank. Together we can improve the lives of Ohioans by ending hunger.

Sincerely,

Mary Anderson
Planned Giving Officer

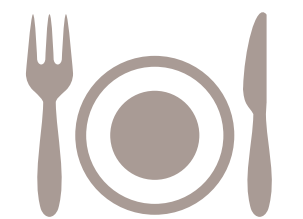
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12404 Jackson, OH 45640

Tel 740-286-6685
Fax 740-286-6686
seohiofoodbank.org



25,000
people in Jackson County
don't have enough
food to eat.



3 million
meals missed by hungry
families in the region.
**10,000 OF THOSE
ARE CHILDREN**

QUICK FACTS ABOUT OUR Y

OUR CAUSE

The YMCA of the Greater Twin Cities is a cause-driven organization that works toward strengthening our community through:



• **Youth Development.** We encourage and nurture the potential of all the youth we serve.



• **Healthy Living.** We improve the health and well-being of individuals and families throughout our community.



• **Social Responsibility.** We give back and provide support to our neighbors.

OUR IMPACT

- We are one of Minnesota's largest nonprofits, employing more than 4,500 people.
- We offer \$7 million in annual scholarships, helping more than 40,000 people.
- Our camps are a place to grow for more than 25,000 young people each year.
- Our youth development programs build leadership skills and values in more than 10,000 youth.
- We are a premier resource for healthy living for more than 150,000 members.
- Our Youth Intervention Services offers hope and help to 2,000 challenged or displaced teens.

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3 Quick Actions You Can Take

Return the enclosed survey to request our FREE guide *The Best Present for Anyone on Your List.*

Visit www.ymcatwincities.org to uncover creative ways to support our important work.

Contact us for more information on your many opportunities for making a difference.

YMCA OF THE GREATER TWIN CITIES

30 South 9th Street
Minneapolis, MN 55402
612.371.8706

Cassidy K. Titcomb
Associate Vice President of Advancement
cassidy.titcomb@ymcatwincities.org

www.ymcatwincities.org

SIMPLE GIFTS, BIG IMPACT

3 Easy Ways to Support the Health and Well-Being of Children

If you think that the only way you can extend hope and help to sick children and their families everywhere is by creating a sizable estate gift that involves extensive professional advice, think again.

Sometimes there is a misunderstanding when people hear about estate gifts. Headlines that declare "biggest ever" might come to mind. But planned gifts are modest in size and often consist of resources many of us have.

One of the easiest ways to help children and families who travel great distances for care is to designate RMHC as a beneficiary of one of your assets, such as a retirement plan account, life insurance policy or bank account. You retain complete control over the assets during your lifetime and can spend the money as you wish. By naming RMHC as the beneficiary, you simply allow for any leftover funds, or a portion of those funds, to transfer to us after your lifetime.

- These are gifts you can easily set up yourself. Here are the three things you need:
- **A phone.** Call your retirement plan, bank account or insurance policy administrator.
 - **A form.** Request a change-of-beneficiary form.
 - **A pen.** Fill out the form and return it to the administrator.

Then call us to let us know about your generosity! It would be our honor to thank you for your gift.

+
Contact Barbara Loeslein at (302) 428-5331 or b.loeslein@rmhdc.org to learn more about these smart ways to support our mission and keep families close.

41,946
VOLUNTEER HOURS
Contributed by members of our community in 2015.

42,000
Families have been provided a "home away from home" since we opened on 6/7/1991.

\$1.7 MILLION
Savings in meal and lodging expenses due to the House and Family Room programs in 2015.

FREE GUIDE!



Gifts You Can Afford

Return the enclosed survey to request a **FREE** guide on simple but powerful gift options that won't cost you anything today.



Contributed by members of our community in 2015.



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FREE GUIDE!



4 SIMPLE GIFTS THAT
Deliver Big Results to Children

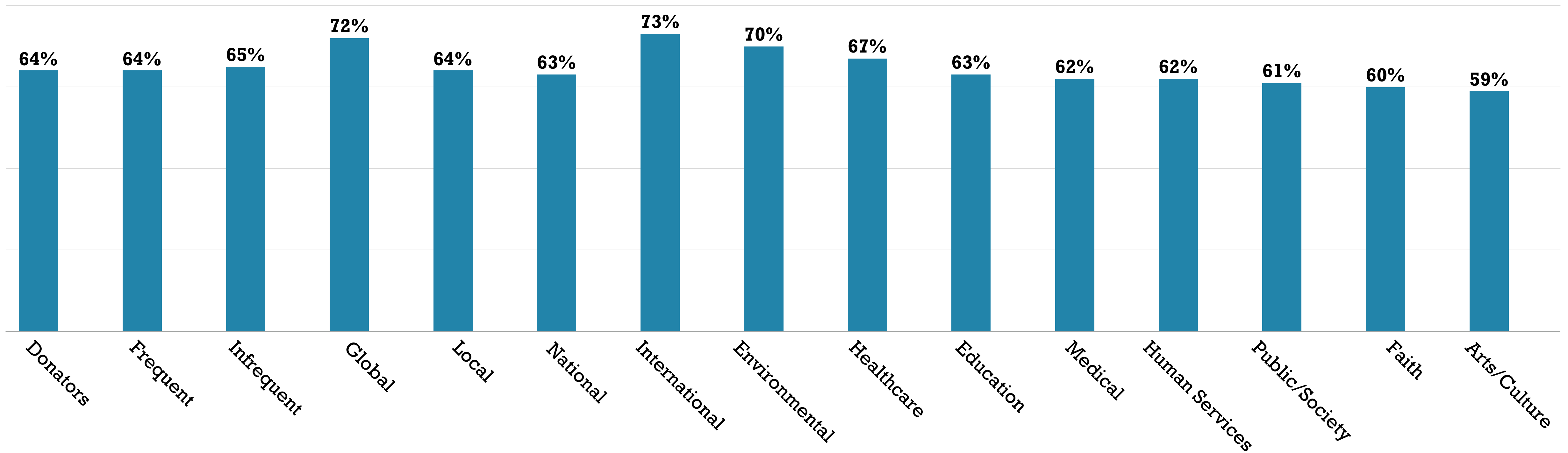
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Majority Indicate They Only Donate to Organizations That Give 100% of Their Donation to The Cause, About 1 in 5 Totally Trust an Organization to Do So

% donors who indicate...

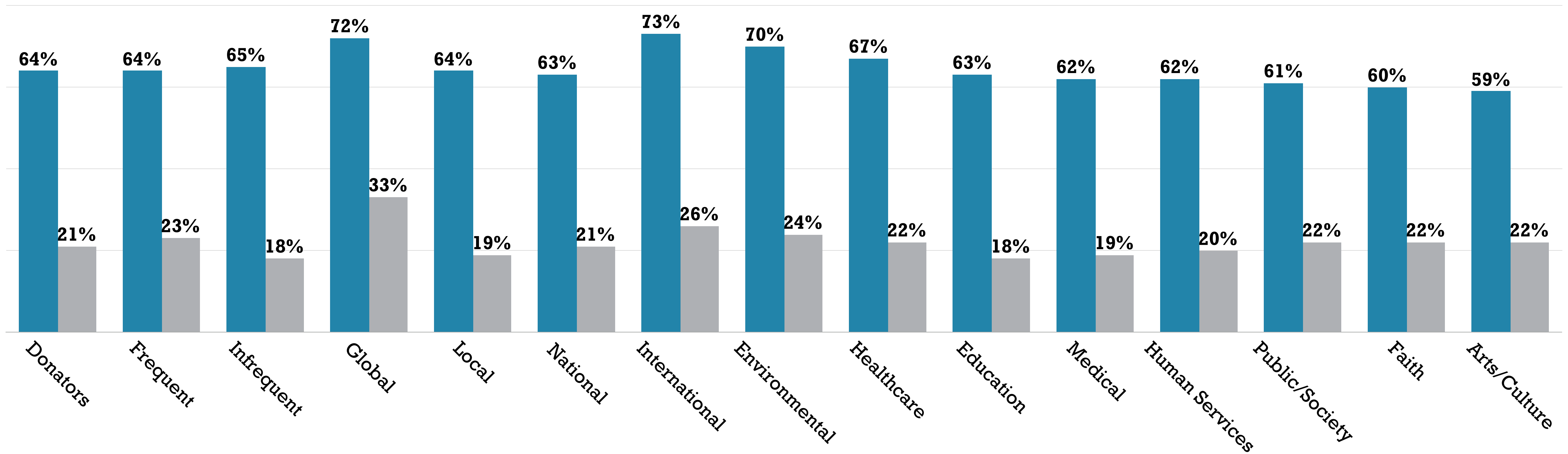
■ Agree with statement ■ Level of Trust



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% donors who indicate...

■ Agree with statement ■ Level of Trust





PROVIDING HOPE

Because of the thoughtful generosity of people like you, BrightFocus Foundation has been able to fund scientists to investigate causes, treatments and possible cures of diseases through our three programs—Alzheimer’s Disease Research, Macular Degeneration Research and National Glaucoma Research. These programs have provided funding for:



MORE THAN
\$87 million
in Alzheimer’s disease
research projects.



MORE THAN
\$15 million
to scientists studying
macular degeneration.



MORE THAN
\$24 million
to scientists studying
glaucoma.

Catholic Charities
ARCHDIOCESE OF WASHINGTON
Inspiring Hope, Building Futures.



Catholic Charities Welcomes Pope Francis

During a historic visit on Thursday, Sept. 24, Pope Francis visited Catholic Charities after his speech to Congress in Washington, DC, to meet with our clients and staff. The Holy Father was extremely generous with his time and attention, and the energy and joy was infectious.

After his blessing of our St. Maria's Meals program, Pope Francis immersed himself into the crowd of 300 homeless individuals shaking hands, kissing babies, receiving hugs and asking for prayers. His final words to the hundreds seated before him inside St. Patrick's parish were a blessing and then he said simply, "And, please, don't forget to pray for me."

Pope Francis' visit is an incredible moment for the more than 900 staff we have serving with more than 100,000 men, women and children locally each year. His memorable visit and compassion for people will always be remembered.

"Charity is born of the call of a God who continues to knock on our door, the door of all people, to invite us to love, to compassion, to service of one another."
—Pope Francis

Your generosity allows us to continue inspiring hope and building futures through Catholic Charities. Contact us to learn how you can help spread the Gospel message.



Helped
140
homeless families
move into their
own apartments.

Get Organized Today

Ease the Burden on Your Family

If you already have the documents needed to ensure that your wishes will be taken care of after your lifetime, it's time to get organized. The following estate planning documents should be kept together to make taking care of your final affairs as stress-free as possible for your loved ones.

Keep these documents in a safe place, such as a safe-deposit box—just make sure your family is aware of their location and where to find the key.

- A copy of your will or living trust (your original will should be kept with your estate planning attorney)
- Documents to help beneficiaries locate all assets passing to them, such as deeds of property, life insurance policies, where you have bank accounts and copies of account statements
- The names and addresses of:
 - » Your executor and trustee
 - » Your financial advisor
 - » Your tax preparer
 - » The individual you named as the attorney-in-fact in your power of attorney
 - » The law firm that drafted your will or trust and the name of the specific attorney
- Beneficiary designation forms for your retirement account, along with year-end statements and a listing of where you have accounts and what types

A Family-First Approach to Charitable Giving

Remember Catholic Charities in Your Will or Living Trust

In addition to passing assets to loved ones, your will or living trust can also be used to define your legacy through support of Catholic Charities. When you remember us through a gift in your estate plans, you join a special group of people who have made some of our most important advances possible.

Advantages

- **Simplicity.** As little as one sentence in your will or living trust is all that is needed to complete your gift.
- **Flexibility.** Until your will or trust goes into effect, you are free to alter your plans.
- **Versatility.** You can give a specific item, an amount of money, a gift contingent upon certain events or a percentage of your estate.

How a Gift in Your Will Works

Your estate planning attorney can help you structure a gift so your loved ones will be taken care of first after you're gone. He or she will include our sample language in a will or living trust you create, or add it to existing documents through an amendment called a codicil. A popular option is to leave a percentage of what is left of your estate after other beneficiaries have received their share so your gift will remain proportionate to the size of your estate, no matter how it fluctuates.

Return the enclosed survey to receive official language for including Catholic Charities in your will or living trust, or contact us with any questions. We're happy to help, with no obligation. You can also use the survey to request our FREE bequest guide *Make Your Final Wishes Come True*.



Catholic Charities / By the Numbers

8,764
people volunteered with us last year.

665
Our Employment Programs helped people get started in a new job.



4.2 million
meals were served last year across all of our programs.

Q&A

Shape Our Future

By including Catholic Charities in your long-term estate or financial plans, you can make a powerful testament of your priorities. And because there are several ways to accomplish your gift, you have the flexibility to fulfill your goals in a way that works best for you. One option, called a charitable gift annuity, allows you to shape our future while you receive fixed, dependable payments for life.

In Their Own Words

A couple talking about their recent gift to Catholic Charities:

Q: Why did you establish a two-life charitable gift annuity with Catholic Charities?

A. A charitable gift annuity provides an additional, stable, regular stream of payments that are very welcome at this time in our lives, when we are both retired. Another benefit of a two-life charitable gift annuity is that the payments will continue to the surviving spouse.

For us, the gift annuity process was simple and straightforward. We chose quarterly payments and will receive a 1099 form each year for tax purposes.

Q: Why did you choose Catholic Charities?

A. We have confidence in Catholic Charities' impressive track record providing health care, education, food and shelter for the less fortunate in our area. Our gift annuity allows us to make a commitment to this recognized and properly managed agency.



Return the enclosed survey today to receive a FREE, no obligation gift illustration and see how you can benefit today.



AmeriCares Champions Children in Africa

Africa is home to more than 34 million orphans. Here is a snapshot of some of the assistance AmeriCares has provided in recent years.



Course treatments of nutritional supplements given to orphaned and vulnerable children in Ghana.



180

Health facilities and health care providers given medicines, medical equipment and supplies.



7 million

Units of medicine and medical supplies given to combat the spread of Ebola.

Create a Meaningful Legacy at AmeriCares Today

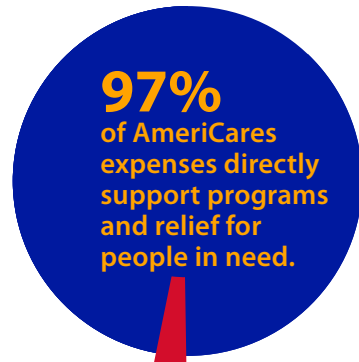
Here are a few easy-to-implement ways to fulfill your philanthropic wishes and provide lifesaving care to individuals and families around the world through AmeriCares programs and services.

A GIFT IN YOUR WILL

A gift in your will or living trust, known as a bequest, works well for many of our supporters because it is a simple and flexible way for you to support AmeriCares without using any of your assets today. You can add a bequest to your will in as little as one sentence, but that sentence has the power to transform lives. A bequest is completely customizable, so you can give a percentage of your estate or a fixed amount. The versatility of a gift in your will allows you to tailor your gift to fit your circumstances, balancing your philanthropic goals with the future needs of your loved ones. Fill out and return the enclosed reply card if you would like more information about how to include AmeriCares in your will or trust.

BENEFICIARY DESIGNATIONS

You may also consider naming AmeriCares as a beneficiary of your retirement plan, life insurance or other asset, which typically entails filling out a simple change-of-beneficiary form.



3% administration and overhead

AmeriCares

A passion to help. The ability to deliver.

AmeriCares
88 Hamilton Avenue | Stamford, CT 06902
Malaine Miller | 203.658.9634
mmiller@americares.org

americares.org/giftplanning

AmeriCares

HAVE A GREATER IMPACT Today and Tomorrow



While “Personal Experience” Is Also The Preferred Way, Some Differences Do Exist

Index of specific organization donors indicating where/from whom they would first like to learn about a charitable organization

	% Donors	Arts/ Culture	Education	Environmental	Faith	Healthcare	Human Services	International	Medical	Public/ Society
Personal experience	29%	148	100	97	75	95	104	96	99	115
Friends/relatives	17%	85	118	82	90	93	104	77	108	87
Internet/websites	14%	94	105	123	135	93	85	139	106	115
Spouse/significant other	7%	69	85	114	140	85	108	84	75	38
Non-profit organization employee	6%	25	101	106	116	112	117	129	88	92
Television/radio advertisements	7%	31	53	108	63	134	97	41	117	87
Direct mail (from post office)	6%	78	86	93	163	117	105	95	117	88

* Yellow shading denotes a high index (≥ 120)



Ms. Charlotte Milcetic-Picallo
23 Capistrano Ct
Clayton CA 94517-1703

T87
R170
SOC

Prepare for Your Future and Ours

Dear Ms. Milcetic-Picallo,

Happy 2015! Each new year provides an opportunity to reflect on the past and anticipate tremendous promise the future brings.

Over the past year, the National MS Society distributed nearly \$260 million to support ground-breaking research and to provide critical services and information. We thank you for your support which made this progress possible; the exciting advances that are underway this year demonstrate the impact of your giving.

Your continued support is helping us stop MS progression, to restore lost function and to end MS forever. While we acknowledge and celebrate new discoveries, we know very well our work is not done. The National MS Society is in the midst of planning for the future. We will launch a new strategic plan in November which will allow us to work relentlessly and thoughtfully to achieve our goals.

In this issue of *Legacy*, the Society hopes to help you and your loved ones plan for the upcoming years by including valuable estate planning tips. If it has been a few years since you've reviewed your estate plan—or if you don't have one at all—take control of your estate in 2015.

As a supporter of the Society, you know how fulfilling it feels to give back to organizations like the National MS Society. **Look inside this issue for a few ways to include a gift in your estate plan** that can help you meet both your personal and charitable goals.

Please contact me at 800-923-7727 if you have any questions about using your estate plan to make a difference at the National MS Society. Your generosity means more than you know to those affected by MS, and we can't say thank you enough for your partnership in ensuring these individuals can live their very best lives.

Sincerely yours,

Mary Milgrom
Individual Giving

Return the enclosed survey today to let us know why you support the Society. Your experience can inspire others to follow your lead.

JOIN THE MOVEMENT
Broadway Station 900 S. Broadway, Suite 200 Denver, CO 80209-4198 tel +1 303 698 6100 fax +1 303 698 6120 www.nationalMSsociety.org



Mr. & Mrs. D Bradford Wetherell, Jr.
221 Mount Auburn St Apt 506
Cambridge MA 02138-484

T5
R586
CVLT

Prepare for Your Future and Ours

Dear Mr. & Mrs. Wetherell,

Happy 2015! Each new year provides an opportunity to reflect on the past and anticipate tremendous promise the future brings.

Over the past year, the National MS Society distributed nearly \$260 million to support ground-breaking research and to provide critical services and information. We thank you for your support which made this progress possible; the exciting advances that are underway this year demonstrate the impact of your giving. On behalf of those we serve, we extend our sincere gratitude.

While we acknowledge and celebrate new discoveries, we know very well our work is not done. We must intensify our efforts if we are to address the needs of all those impacted by MS. To stop MS progression, to restore lost function and to end MS forever will require immediate and focused action.

The National MS Society will launch a new strategic plan in November which will allow us to work relentlessly and thoughtfully to achieve our goals. We appreciate that you, too, carefully consider your own needs and options in working toward your personal goals. In this issue of *Legacy*, the Society hopes to help you and your loved ones plan for the upcoming years by including valuable estate planning tips.

If it has been a few years since you've reviewed your estate plan—or if you don't have one at all—take control of your estate in 2015. Did you know your estate plan can be used to meet both your personal and charitable goals? That you can support the Society and your loved ones? There are easy ways to extend your generosity without immediately giving up any assets. **Look inside this issue for ways to include a gift in your estate plan** that you may not have thought of before.

Please contact me at 800-923-7727 if you have any questions about using your estate plan to help create a more promising future for others. Your generosity means more than you know to those affected by MS, and we can't thank you enough for your partnership in ensuring these individuals can live their very best lives.

Sincerely yours,

Mary Milgrom
Individual Giving

Return the enclosed survey today to let us know why you support the Society. Your experience can inspire others to follow your lead.

JOIN THE MOVEMENT
Broadway Station 900 S. Broadway, Suite 200 Denver, CO 80209-4198 tel +1 303 698 6100 fax +1 303 698 6120 www.nationalMSsociety.org



Galen, diagnosed in 2011

Have you already included the National MS Society in your will or trust? Let us know by returning the enclosed survey today.



HAVE YOU HEARD OF GIFT PLANNING?

The Option That Doesn't Require Opening Your Wallet Today

Did you know there are many ways to give to the National MS Society besides writing a check? With a little planning, you can include a gift to the Society within your overall estate or financial plans that supports our mission and provides you with tax benefits in return.

These types of gifts are known as "planned gifts" and they often provide you with two main benefits:

1. Your gift is generally deferred until after your lifetime, so your current income isn't affected.
2. With many planned gifts, you have the right to change your mind at any time throughout your lifetime, if necessary.

People tend to assume that planned gifts are only for the wealthy. This couldn't be further from the truth—planned gifts are for anyone who has an estate. How do you know

if you have an estate? It is easy to find out by just taking a look around. If you have any belongings, then you have an estate. Use your estate to provide for loved ones after your lifetime and support life-changing organizations like the Society.

A gift in your will or revocable living trust is the most popular type of planned gift; our supporters prefer this option because it is flexible and can be structured in a number of ways.

No matter which planned gift you choose, it is reassuring to know your donation will allow you to extend your impact into the future. You can feel confident in the fact that we will be here to address the challenges of everyone affected by MS for years to come thanks to your support.

VISIT www.nationalMSsociety.org/plannedgiving to uncover which planned gift is right for you.

DON'T PROCRASTINATE ONE MORE DAY

Estate planning and long-term financial planning often go hand-in-hand. Start these important processes today with our FREE guides *What You Need to Know About Wills* and *Retirement Planning: How to Make Your Dollars Last*. Both guides provide easy-to-follow tips on how to create plans that provide peace of mind now and after your lifetime. Just return the enclosed survey today!



Robert, diagnosed in 1990

A SURPRISE FROM THE IRS

Your IRA May Be Worth Less Than You Think

More than likely, a substantial portion of your savings is in your retirement plan. And, as you plan your estate, you may be considering how to use those savings to benefit your heirs.

But did you know that retirement plan assets are subject to income and possible estate taxes when given to your family? Although there are ways in which spouses (and, to a lesser extent, other heirs) can defer taxes on these assets when they postpone the date they are to receive the funds, they, too, are subject to income tax when they make withdrawals. The income tax bill can reduce your retirement plan by as much as 39.6 percent. That percentage can be even higher if your estate is subject to estate taxes.

If you would like to make a gift after your lifetime to support the National MS Society, see why your retirement plan might be the perfect asset to use by reviewing the chart below.

COMPARE THE TAX CONSEQUENCES

\$100,000 Retirement Plan Left to Your Family vs. the Society

Chosen Beneficiary	Your Family	The National MS Society
Value of retirement plan at your death	\$100,000	\$100,000
Federal income taxes (assumed 35 percent marginal income tax bracket)	\$35,000	\$0
Net amount paid to beneficiary	\$65,000	\$100,000


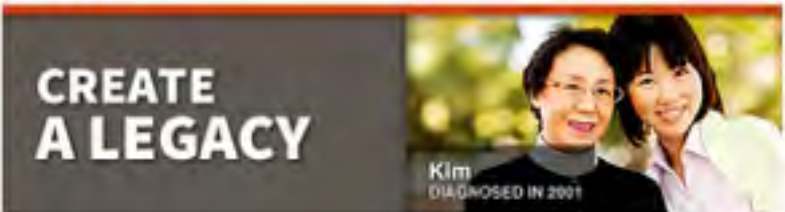
HOW TO MAKE A GIFT OF RETIREMENT PLAN ASSETS

If you're interested in this tax-efficient form of giving and would like to name the Society as beneficiary, simply contact your retirement plan administrator for a change-of-beneficiary form. Decide what percentage you would like us to receive and name us, along with the percentage you chose, on the beneficiary form. Then return the form to your plan administrator.

National MS Society - Create a Legacy - Simple Ways to Leave a Le...

NMSS
Tuesday, March 31, 2015 @ 10:16 AM
To: Shayna Zmolek


To view this email as a Web page, click here. Forward to a Friend.

Shayna,
If you're like many of our supporters, you want to make an impact at the National MS Society, but you're concerned about preserving your financial security. The articles below offer simple strategies to support the programs of the Society through your long-term plans.


As always, feel free to contact me if you have any questions or would like to learn more about any of the topics discussed below.

Gratefully,
Tamara Gaedke
Planned Giving Specialist




Break Through the Barriers of MS
With the help of supporters like you, the Society is able to move research forward to prevent, treat and cure individuals living with MS. In 2014, the Society was able to honor Dr. Philip L. De Jager, M.D., Ph.D., with the Saranok Prize for Innovation in MS Research due to his and his team's outstanding work in studying the neurological markers of MS.

[Read More](#)




The Three Easiest Ways to Leave Your Legacy




Inspire Others to Give

Simple Ways to Leave a Legacy




Keep Your Cash Now, Make a Difference Later

[Read More](#)



Take the Complexity Out of Generosity

[Read More](#)



Do You Spend Time Online? You Need to Read This


[Read This](#)

Your Options

- Gift Illustrator
- Ways to Give
- Meet Our Donors
- Get Involved
- MS Research
- Online Community

We are Here to Help
Do you have questions regarding planned giving or other ways to support the mission? Our planned giving team is here to help.

National MS Society
900 South Broadway, 2nd Floor | Denver, CO 80209
Phone: 800-923-7727
Email: giftplanning@nmsa.org

JOIN US 

Early and ongoing treatment with an FDA-approved therapy can make a difference for people with multiple sclerosis. Learn about your options by talking to your health care professional and contacting the National MS Society at www.nationalmssociety.org or 1-800-344-4887.


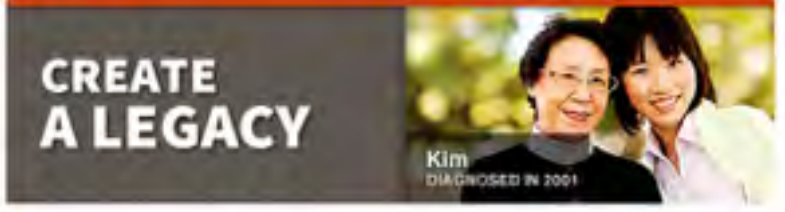
National MS Society respects your online time and privacy. If you no longer wish to receive this planned giving newsletter, please click [opt out](#).

Ages 40-54

National MS Society - Create a Legacy - A Smart Use for Your Reti...

NMSS
Tuesday, March 31, 2015 at 10:31 AM
To: Shayna Zmolek


To view this email as a Web page, click here. Forward to a Friend.

Shayna,
Your retirement plan will likely be your greatest asset when you retire, but these accounts don't make such a great inheritance for your loved ones. The articles below explore an alternative that provides for the programs of the National MS Society, as well as other tax-saving strategies for retirement.


As always, feel free to contact me if you have any questions or would like to learn more about any of the topics discussed below.

Gratefully,
Tamara Gaedke
Planned Giving Specialist




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[Read More](#)




The Three Easiest Ways to Leave Your Legacy




Inspire Others to Give

A Smart Use for Your Retirement Plan




Consider Us In Your Retirement Plan

[Read More](#)



4 Ways to Save More Money for Retirement

[Read More](#)



Shape Our Future and Receive Lifetime Payments


[Read More](#)

Your Options

- Gift Illustrator
- Ways to Give
- Meet Our Donors
- Get Involved
- MS Research
- Online Community

We are Here to Help
Do you have questions regarding planned giving or other ways to support the mission? Our planned giving team is here to help.

National MS Society
900 South Broadway, 2nd Floor | Denver, CO 80209
Phone: 800-923-7727
Email: giftplanning@nmsa.org

JOIN US 

Early and ongoing treatment with an FDA-approved therapy can make a difference for people with multiple sclerosis. Learn about your options by talking to your health care professional and contacting the National MS Society at www.nationalmssociety.org or 1-800-344-4887.



National MS Society respects your online time and privacy. If you no longer wish to receive this planned giving newsletter, please click [opt out](#).

Ages 55-69

National MS Society - Create a Legacy - A Legacy of Giving - Temporary Items

NMSS
Tuesday, March 31, 2015 at 10:35 AM
To: Shayna Zmolek


To view this email as a Web page, click here. Forward to a Friend.

Shayna,
You want your legacy to include helping others realize their dreams, whether it's your grandchildren or someone with multiple sclerosis. The articles below offer tax-smart ideas to help you provide for both your loved ones and the National MS Society.


As always, if you have any questions about the topics covered below, don't hesitate to contact me.

Gratefully,
Tamara Gaedke
Planned Giving Specialist




Break Through the Barriers of MS
With the help of supporters like you, the Society is able to move research forward to prevent, treat and cure individuals living with MS. In 2014, the Society was able to honor Dr. Philip L. De Jager, M.D., Ph.D., with the Saranok Prize for Innovation in MS Research due to his and his team's outstanding work in studying the neurological markers of MS.

[Read More](#)




Strengthen Your Future With a Charitable Gift Annuity




Inspire Others to Give

A Legacy of Giving




Be There for Your Grandkids

[Read More](#)



Life Changes Quickly: Has Your Will Kept Up?

[Read More](#)



Shape Our Future and Receive Lifetime Payments


[Read More](#)

Your Options

- Gift Illustrator
- Ways to Give
- Meet Our Donors
- Get Involved
- MS Research
- Online Community

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National MS Society
900 South Broadway, 2nd Floor | Denver, CO 80209
Phone: 800-923-7727
Email: giftplanning@nmsa.org

JOIN US 

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National MS Society respects your online time and privacy. If you no longer wish to receive this planned giving newsletter, please click [opt out](#).

Ages 70+



Leave the Last Slice for Us

★ PROVIDING FOR DAR'S FUTURE IS AS EASY AS PIE.

With as little as one sentence in your will or living trust, you can create a legacy that allows us to preserve our American story for future generations.

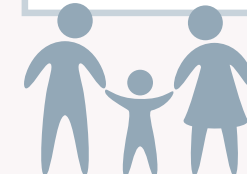
To learn more about including DAR in your will, please complete and return the enclosed reply card or visit us online today at www.ouramericanlegacy.org.



HOW THE GIFT WORKS
Create a will or trust leaving part of your estate to family and part to DAR. You can also give a specific amount of cash, securities or property.

1
WILL OR TRUST

2
YOUR FAMILY



3
After your lifetime, your family and DAR receive your gifts.



Be part of our American legacy.



★ THE LEGACY OF GIVING

Members of the Daughters of the American Revolution have a long tradition of selfless giving in support of historic preservation, education and patriotism. DAR's achievements throughout its history have been significant, and they have occurred only through the stewardship of Daughters like you. The needs fulfilled with your financial support are inspiring, and your continued generosity will sustain DAR long into the future. Thank you.

Learn more here:
www.ouramericanlegacy.org

Your legacy starts here!
Thank you.

Daughters of the American Revolution
Office of Development
1776 D St. NW
Washington, D.C. 20006-5303

Preserve
America's
Story
*Turn to Page 17 to start
creating your legacy today.*

Your legacy can protect
and preserve chapters
of our American story.



Yes, I want to create my legacy so I can impact the future of DAR and our country. Please send me:

- Information about including a gift in my will or trust.
- Bequest language to share with my attorney.
- Materials on estate planning and wills.

NAME _____

ADDRESS _____

CITY, STATE ZIP _____

TELEPHONE _____ BEST TIME TO CALL _____

EMAIL _____

NATIONAL NUMBER _____



Office of Development | (800) 449-1776 | giftplanning@dar.org

15ASD3



Leave the Last Slice for Us

Including a gift to DAR in your estate plan is a unique way to create a legacy that will sustain the Society into the future.

Start Planning Your Legacy Now

Enter your details below to download our brochure *A Guide to Making Your Will: Direct Your Assets to the People and Causes You Care About Most.*



Name (required)

Email (required)

National Number

- I have already included DAR in my estate plan.
- Please send me sample bequest language to share with my estate planning attorney.

[DOWNLOAD MY BROCHURE](#)

Importance of Estate Planning Documents



Men

41% Very Important

35% Have a Will




Women

45% Very Important

30% Have a Will

To view this email as a web page, click [here](#)

Forward to a friend: 



Dear [REDACTED],

If you've put off writing your will or solidifying your plans for the future, you're not alone. Over half of Americans don't have plans to protect the people and causes that matter most to them.

As a valued member of our Creighton community, we care about your future and want to help you achieve the peace of mind that comes with having a plan in place that will benefit you and generations to come. That's why, as part of National Estate Planning Awareness Week, we are offering you a complimentary *Personal Estate Planning Kit*.



Our kit makes estate planning simple. It takes you through the process step-by-step, answering your questions and providing clarity to put together a plan that will benefit you and your family.

Let us help you plan for the future with a complimentary gift. If you have any questions, please don't hesitate to contact me directly.

I'm Here to Help

Mike O'Malley
 Director of Estate and Gift Planning
 402-280-2169 (w) | 402-332-9853 (m)
giftplanning@creighton.edu
www.creighton.edu



Creighton University | 2500 California Plaza | Omaha, NE 68178

Creighton University respects your online time and privacy.
 If you no longer wish to receive this planned giving eNewsletter, please click [unsubscribe](#).

If you've put off writing your will or solidifying your plans for the future, you're not alone. Over half of Americans don't have plans to protect the people and causes that matter most to them.

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Our kit makes estate planning simple. It takes you through the process step-by-step, answering your questions and providing clarity to put together a plan that will benefit you and your family.



Did You Notice Our New Look?

For nearly 100 years, Easterseals has been changing the way the world defines and views disabilities. We make profound, positive differences in people's lives every day.

Now more than ever, the challenges in the disability community are more complex and the definition of disability is broad, going beyond physical conditions to include invisible, emotional, social and educational challenges. To respond to these shifts, we're re-introducing our organization to the public in a clear, more modern way.

We're unveiling a brighter logo and a new spin on our established name: Easterseals. We also have a new tagline, "Taking on disability together." What hasn't changed: We remain the vital resource for people living with disabilities, veterans, caregivers and families.



Plan Today for Peace of Mind Tomorrow

Disability is a part of life and something that we will all experience at some point, whether personally or as a caregiver for a loved one. Creating a plan that prepares for the future is not only the best way to protect your family, but it also can make a profound, positive difference in the lives of the children and adults Easterseals serves.

That's why we created the **Personal Estate Planning Kit** for you. This FREE home-study course is your one-stop guide for creating plans that protect the people and causes you care about most.



Don't wait to start planning your family's financial future. Visit easterseals.com/pepc to download your FREE Personal Estate Planning Kit today or return the enclosed reply card.

This publication is not intended as legal, accounting or other professional advice. For assistance in charitable planning, always engage the services of a qualified professional.



"The Seldowitz Scholarship has made my AU education more affordable and allowed me the flexibility to accept an unpaid internship that provides real world experience and has fueled my interest in politics. I am grateful to the AU friend who created this scholarship and to the university for investing in my success and believing in me."

—Aaron Torop, SPA/BA '18
Estelle Seldowitz Endowed Scholarship Recipient

HONOR YOUR CONNECTION TO AMERICAN UNIVERSITY

Many of our most ardent supporters trace their inspiration for giving to a loved one or a very personal connection to AU.

If you value the meaningful work we do for AU students, consider making a donation in tribute of a loved. Tribute gifts are also a great way to remember loved ones who are no longer with us.

How to Make a Tribute Gift

• **Make a gift today.** An outright gift can help fund our immediate needs or an upcoming project. The financial benefits include an income tax charitable deduction when you itemize deductions on your federal income tax return, and the possible elimination of capital gains tax.

• Make a gift through your estate plan.

Include a gift in your will, stating that a specific asset, certain dollar amount, or percentage of your estate pass to us after your lifetime in honor of a loved one.

• Make a gift that lives on forever.

Honorary endowments can be made now or in your estate plan. A small portion of your gift, rather than the whole amount, is used each year for a particular purpose. To perpetuate the fund forever, the majority always remains intact and is invested for the future.

Want to learn more about how you can support AU in a way that is significant to you? Contact our planned giving team today to begin a conversation.



Plan for the Future

Preparing your will and making other future plans can bring peace of mind. That's why we created the *Personal Estate Planning Kit* and brochure, *How Do You Want to Be Remembered?* To help your loved ones better understand why you made the plans you did, please return the enclosed reply card and request these planning resources today.



American University
4400 Massachusetts Avenue, NW
Washington, DC 20016-8143

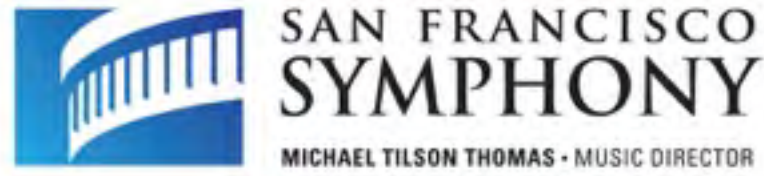
american.edu/plannedgiving

Seth D. Speyer
Executive Director of Planned Giving
202-885-3411
speyer@american.edu

Kara Barnes
Director of Planned Giving
202-885-5914
kbarnes@american.edu

Interest In Issues Related to Charitable/Planned Giving

	Total GP	Millennials	Gen X	Boomers	Matures	Net Worth <\$500K	Net Worth \$500K-\$2M	Net Worth >\$2M
Honoring a family member by making a tribute gift	20.4%	27.5%	21.8%	14.1%	9.6%	21.2%	20.4%	28.1%
Charitable Gift Annuity	12.4%	17.2%	14.7%	7.7%	3.1%	13.8%	11%	22.5%
Charitable Remainder Trust	10.2%	13.2%	14.1%	6.1%	3.1%	10.9%	12.4%	24.1%
Immediate tax deduction in exchange for the right to inherit your home (or other land) at the end of your life	9.5%	13%	11%	5.4%	6%	10.2%	10.9%	22.2%
Saving capital gains taxes by making a gift of stocks or bonds to a charity	8.4%	12.1%	10.1%	4.2%	4.5%	8.6%	9.4%	29.6%



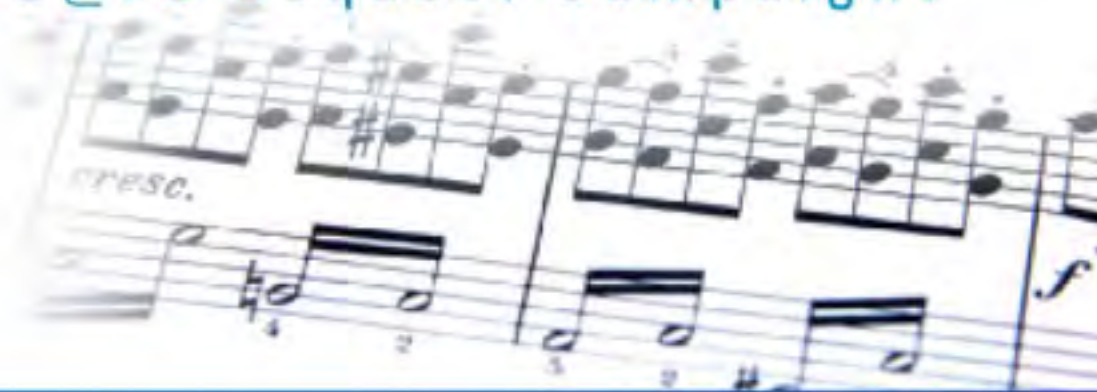
Create the Future of the
**SAN FRANCISCO
 SYMPHONY**
 in a Simple and
 Powerful Way



Act Now and Make a Lasting Impact
 With the Symphony's 70@70 Bequest Campaign

Need Another Reason to Participate in the 70@70 Bequest Campaign?

When you join the Pierre Monteux Society this season, you will be included in a drawing to win two seats to a special concert evening: dinner in the Wattis Room followed by MTT conducting Beethoven's Fifth Symphony—the last concert of the 2014–15 season on Saturday, June 27, 2015!



Won't you join us? Return the envelope below to learn more.

Give Forward to Future Audiences With a Special 70th Birthday Gift to MTT and the Symphony

You can create your lasting impact on the Symphony as a participant in our 70@70 Bequest Campaign. It's a simple and powerful way to perpetuate your special connection to the Symphony and provide treasured musical experiences to future audiences and students:

- **Name the Symphony as a beneficiary** for any amount in a will, trust, IRA, financial account or insurance policy. This costs you nothing in your lifetime, you control your assets and you can modify your gift if your circumstances change.
- **Increase retirement income** by converting appreciated assets or assets with low interest rates into a life income plan. Receive payments for life and tax benefits. What remains in the plan will be directed to future strategic initiatives that bring music to others.

In this milestone season of MTT's 70th birthday, the Pierre Monteux Society aims to add 70 new legacy gifts in recognition of the Symphony and Michael Tilson Thomas' contribution to cultural life in the Bay Area.

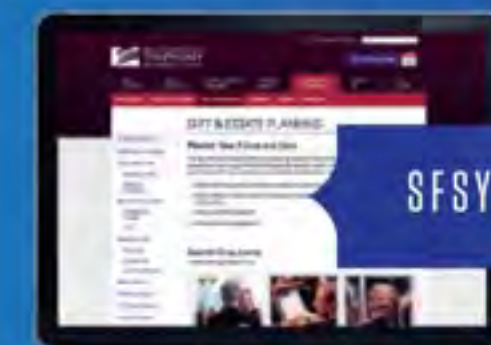
© The Stelter Company. The information in this publication is not intended as legal or tax advice. Please consult your legal and tax advisors. Individual state law may impact your results.



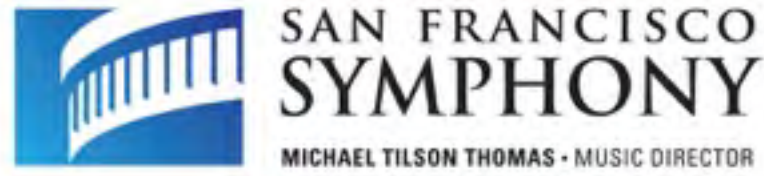
Thank You!
 We look forward to creating a partnership with you that continues bringing classical music to the Bay Area.



HAVE A QUESTION?
I CAN HELP.
 Stephen D. Steiner, JD
 Director, Gift Planning
 415.503.5445
 ssteiner@sfsymphony.org



SFSYMPHONY.PLANMYGIFT.ORG



Need Another Reason to Part

When you join the Pierre Monteux Society this season, you'll be in a drawing to win two seats to a special concert evening in the Grand Concourse Room followed by MTT conducting Beethoven's Fifth. The concert of the 2014-15 season on Saturday, June 27, 2014.

FAST FEEDBACK

Please complete and return today. Thank you!

I have included the Symphony as a beneficiary in my will or other estate plans and am interested in being included in the 70@70 Bequest Campaign.

YES NOT AT THIS TIME

I am interested in learning more about including the San Francisco Symphony as a beneficiary in my estate plans.

I would like to receive a copy of the FREE brochure *Your Personal Guide to Gift Planning*.

I have enclosed \$_____ to support the Symphony today.

THANK YOU

for supporting symphonic music in the Bay Area!

Name—Please print.

Telephone

Email

Address

City, State ZIP

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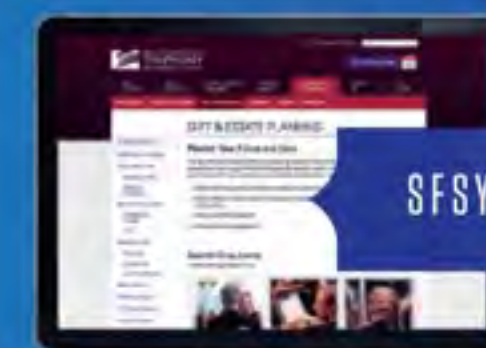
ward to Future Audiences With a Special Birthday Gift to MTT and the Symphony

...an create your lasting impact on the Symphony as a participant in our 70 Bequest Campaign. It's a simple and powerful way to perpetuate special connection to the Symphony and provide treasured musical future audiences and students:

Symphony as a beneficiary for any amount in a will, trust, IRA, account or insurance policy. This costs you nothing in your lifetime, you own your assets and you can modify your gift if your circumstances change. **Retirement income** by converting appreciated assets or assets with low interest rate to a Roth IRA. Receive payments for life and tax benefits. What remains will be directed to future strategic initiatives that bring music to others.

...ne season of MTT's 70th birthday, the Pierre Monteux Society aims to recognize gifts in recognition of the Symphony and Michael Tilson Thomas' cultural life in the Bay Area.

For tax advice, please consult your legal and tax advisors. Individual state law may impact your results.



SFSYMPHONY.PLANMYGIFT.ORG

“I am Comfortable Using New Technologies and Devices.”



General Population



Millennials



Gen X



Boomers



Matures

2016 90%

90%

91%

90%

85%

2015 81.4%

91.3%

85.4%

73%

66.8%

Which of the Following Activities Do You Participate in on a Regular Basis? “Surfing the Internet”



General Population

75%



Millennials

74%



Gen X

80%



Boomers

75%



Matures

67%

Planned Giving

Popular Ways to Give

Wills and Living Trusts
Beneficiary Designations

Gifts That Provide Income

Charitable Gift Annuities
Charitable Remainder Trusts

More Ways to Give

Charitable Lead Trusts
Real Estate
Memorials and Tribute Gifts
Endowed Gifts
Donor Advised Funds

For Professional Advisors

Contact Us



Begin My Giving Journey

I want to plan a gift based on my...




CAMPAIGN FOR THE NEXT CENTURY
A HOPE AND A FUTURE

WHAT'S NEW?

- IRA Charitable Rollover
- 6 Steps to Estate Planning
- Planning Today for Tomorrow

[View All Articles](#)

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- Planned Giving

- Popular Ways to Give

- Wills and Living Trusts
 - Beneficiary Designations

- Gifts That Provide Income

- Charitable Gift Annuities
 - Charitable Remainder Trusts

- More Ways to Give

- Charitable Lead Trusts
 - Real Estate
 - Memorials and Tribute Gifts
 - Endowed Gifts
 - Donor Advised Funds

- For Professional Advisors

- Contact Us

JBU HOME > GIVING > PLANNED GIVING > WILLS AND LIVING TRUSTS

PLANNED GIVING

THE EASIEST WAY TO MAKE AN IMPACT

A Gift in Your Will or Living Trust

Interested in helping John Brown University with our mission but feel overwhelmed by the thought of writing another check or giving up your assets today? A simple, flexible and versatile way to ensure we can continue our work for years to come is a gift in your will or living trust, known as a [charitable bequest](#).

By including a bequest to JBU in your will or living trust, you are ensuring that we can continue our mission for years to come. Your gift also entitles your estate to an unlimited federal estate tax charitable deduction.

Ready to start planning today? View and download your FREE copy of A Guide to Making Your Will: Direct Your Assets to the People and Causes You Care About Most.

[VIEW MY FREE BROCHURE](#)

CHECK OUT THIS POTENTIAL SCENARIO



When Tom and Martha got married, they made a point to put together a will to protect their assets. They both loved JBU and decided to include a bequest of \$75,000 to us in their will.

As Tom and Martha's family grew to include three children, they decided to revise their gift to ensure their children's future financial security. They met with their attorney and simply revised the [bequest language](#) so that their gift to JBU was now a percentage of their estate instead of a specific amount. Tom and



As Tom and Martha's family grew to include three children, they decided to revise their gift to ensure their children's future financial security. They met with their attorney and simply revised the [bequest language](#) so that their gift to JBU was now a percentage of their estate instead of a specific amount. Tom and

Martha now rest easy knowing when they die, their plans will provide for the people and charitable work they love.

LEARN HOW TO FUND IT

You can use the following assets to fund a bequest:

[Cash](#) | [Appreciated Securities](#) | [Real Estate](#) | [Tangible Personal Property](#) | [Closely Held Stock](#)

NEXT STEPS

1. Contact JBU's Office of Planned Giving at 1-800-446-2450 or egreenhaw@jbu.edu for additional information on bequests or to chat more about the different options for including JBU in your will or estate plan.
2. Seek the advice of your financial or legal advisor.
3. If you include JBU in your plans, please use our legal name and Federal Tax ID.

Legal Name: John Brown University
Address: 2000 West University Street, Siloam Springs,
AR 72761
Federal Tax ID Number: 71-0239576

Ready to start planning today?
View and download your FREE
copy of *A Guide to Making Your
Will: Direct Your Assets to the
People and Causes You Care
About Most*.


[VIEW MY FREE BROCHURE](#)

The information on this website is not intended as legal or tax advice. For such advice, please consult an attorney or tax advisor. Figures cited in examples are for hypothetical purposes only and are subject to change. References to estate and income taxes include federal taxes only. State income/estate taxes or state law may impact your results.

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Great Expectations

Melissa, use the new year as motivation to get yourself organized! We've got the right resources to take your to-do-list to done.




Giving With Your Budget in Mind
Discover simple ways to take your charitable legacy to the next level without putting your daily budget at risk. With your support, you can make a big impact on Saint Mary's College of California.
[Learn more](#)


Personal Estate Planning Kit
[Make Your Gift](#)

More Information
[Update Your Info](#)
[A Guide to Making Your Will](#)
[Calculate Your Gift](#)


Save yourself time and hassle this tax season.




An Easy Approach to Tax Season
With these tips, tax season can be a breeze.
[Learn more](#)



Jump-Start Your Giving in 2016
Plan to make a difference in 2016. Use this example wish list to get started.
[Learn more](#)



Planning at Your Age Is Important
Follow these tips to save time and money when creating or updating your estate plans.
[Learn more](#)




I'm Here to Help
Douglas D. Hansen
Planned Giving Officer
(925) 631-4218
ddh@stmarys-ca.edu

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Under 40

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Great Expectations

Melissa, use the new year as motivation to get yourself organized! We've got the right mix of resources so you can cross everything off your to-do list.




4 Ways to Keep Your Finances on Track
Discover simple ways to take your charitable legacy to the next level without putting your daily budget at risk. With your support, you can make a big impact on Saint Mary's College of California.
[Learn more](#)


Personal Estate Planning Kit
[Make Your Gift](#)

More Information
[Update Your Info](#)
[Your Guide to Locating Important Documents](#)
[Calculate Your Gift](#)


Save yourself time and hassle this tax season.




Simplify Your Taxes
With these tips, tax season can be a breeze.
[Learn more](#)



1, 2, 3...Go Into 2016
Plan to make a difference in 2016 and get started with our example wish list.
[Learn more](#)



Don't Put Off Making a Will
Don't wait until you're older to develop a plan that will provide for the people and causes you care about most.
[Learn more](#)




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Ages 40-54

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Great Expectations

Melissa, use these resources that can help as you make important decisions about how to leave a legacy and give back to the organizations that inspire you.




Give Today With Tomorrow in Mind
Discover simple ways to take your charitable legacy to the next level without putting your daily budget at risk. With your support, you can make a big impact on Saint Mary's College of California.
[Learn more](#)


Personal Estate Planning Kit
[Make Your Gift](#)

More Information
[Update Your Info](#)
[The 3 Easiest Ways to Leave Your Legacy](#)
[Calculate Your Gift](#)


Take your philanthropy to the next level.




Feeling the Squeeze of the Sandwich Generation
Learn how you can fit your favorite causes into your financial budget this year.
[Learn more](#)



Ways You Can Give Back in 2016
Make a difference in 2016. Here is our guide to getting started.
[Learn more](#)



3 Easy Ways to Review Your Gift Plan
Follow these tips to save time and money when reviewing your current estate plan.
[Learn more](#)




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Ages 55-69

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Great Expectations

Melissa, use the new year as motivation to get yourself organized! We've got the right mix of resources so you can cross everything off your to-do list.




A Better Tomorrow Starts With You
Discover simple ways to take your charitable legacy to the next level without putting your daily budget at risk. With your support, you can make a big impact on Saint Mary's College of California.
[Learn more](#)


Personal Estate Planning Kit
[Make Your Gift](#)

More Information
[Update Your Info](#)
[What to Do in the First 48 Hours When You Lose a Loved One](#)
[Calculate Your Gift](#)


Take your philanthropy to the next level.




Take Control This Tax Season
With these tips, tax season can be a breeze.
[Learn more](#)



What Can You Do to Give Back in 2016?
Make a difference in 2016. Use our example wish list to get started today.
[Learn more](#)



Protect Your Estate Plans
Follow these tips to save time and money when creating or updating your estate plans.
[Learn more](#)



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Ages 70+



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Estate planning is for everyone, regardless of age or assets.



1 Simple Thing YOU Can Do Right Now

Estate planning allows you to protect the people and causes you care about most, no matter what twists and turns happen in life. Learn more today.

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1 Simple Thing YOU

Estate planning allows you to no matter what twists and turn

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NO ONE DOES MORE FOR VETERANS.

Class Is in Session – From the Comfort of Your Home



Personal Estate Planning Course Lesson Book
This helpful course walks you through the estate planning process step-by-step, removing the question marks and giving you the insight to put together a plan that will benefit you – and generations to come.

* Name: First Last

* Email:

Address 1:

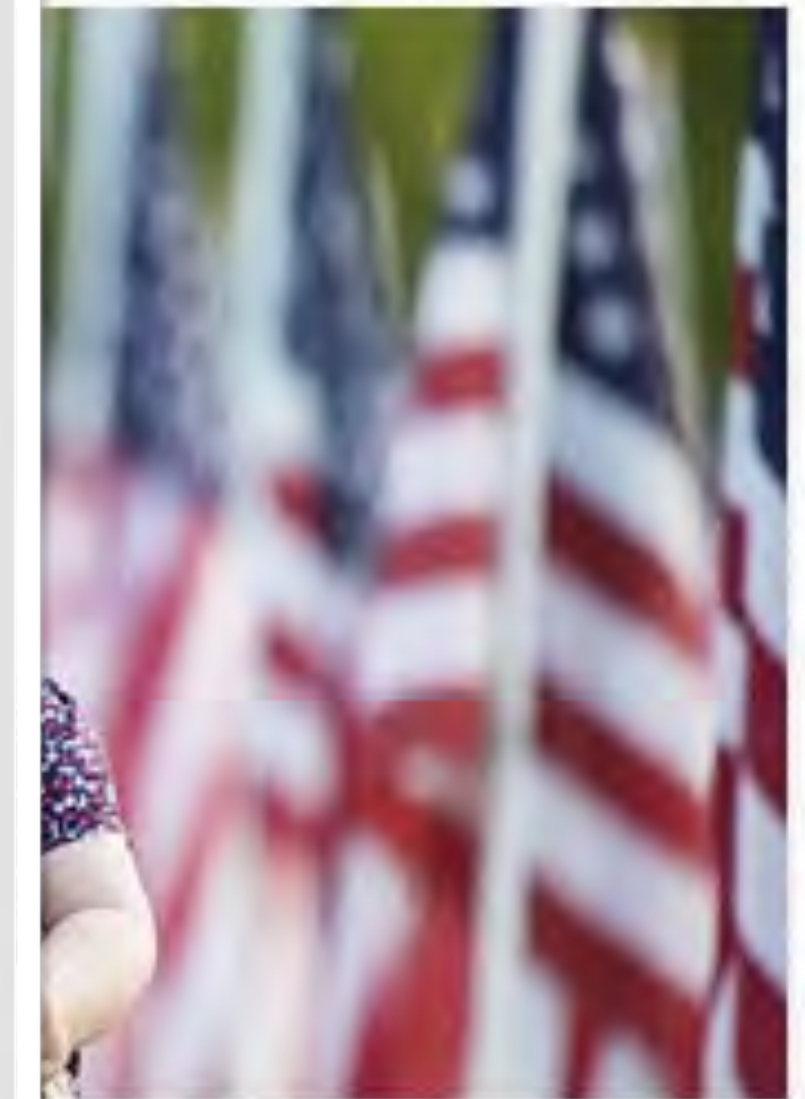
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* City/State/ZIP: City State ZIP

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causes you care about most, more today.

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Veterans of Foreign

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Estate planning is for every



1 Simple Thing YOU

Estate planning allows you to no matter what twists and turn

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Class Is



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* Email:

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* City/State:

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FREE Planning Resources

View and download the FREE brochures below to learn more.



VFW PERSONAL ESTATE PLANNING COURSE LESSON BOOK

You may feel like estate planning is about as enjoyable as a bad pop quiz, but we are here to help. Use this lesson book to put together a plan that will benefit you – and generations to come.

Download Now »

MORE BROCHURE DOWNLOADS



A Guide to Making Your Will

Putting together a will is one of the most important ways you can protect your loved ones. And it is not as complicated as you might think. Learn more about wills by requesting our FREE brochure *A Guide to Making Your Will*.

Download Now »



What to Do in the First 48 Hours When You Lose a Loved One

When a loved one dies, will you know what to do? Learn what to do in those first critical days after your loved one is gone in our FREE guide *What to Do in the First 48 Hours When You Lose a Loved One*.

Download Now »



Estate Planning Starters

Discover how to ensure a solid financial future for your loved ones and the charitable organizations you love with our FREE guide *Estate Planning Starters*. You will find valuable tips and information on the benefits of careful estate planning.

Download Now »

ge or assets.



OW

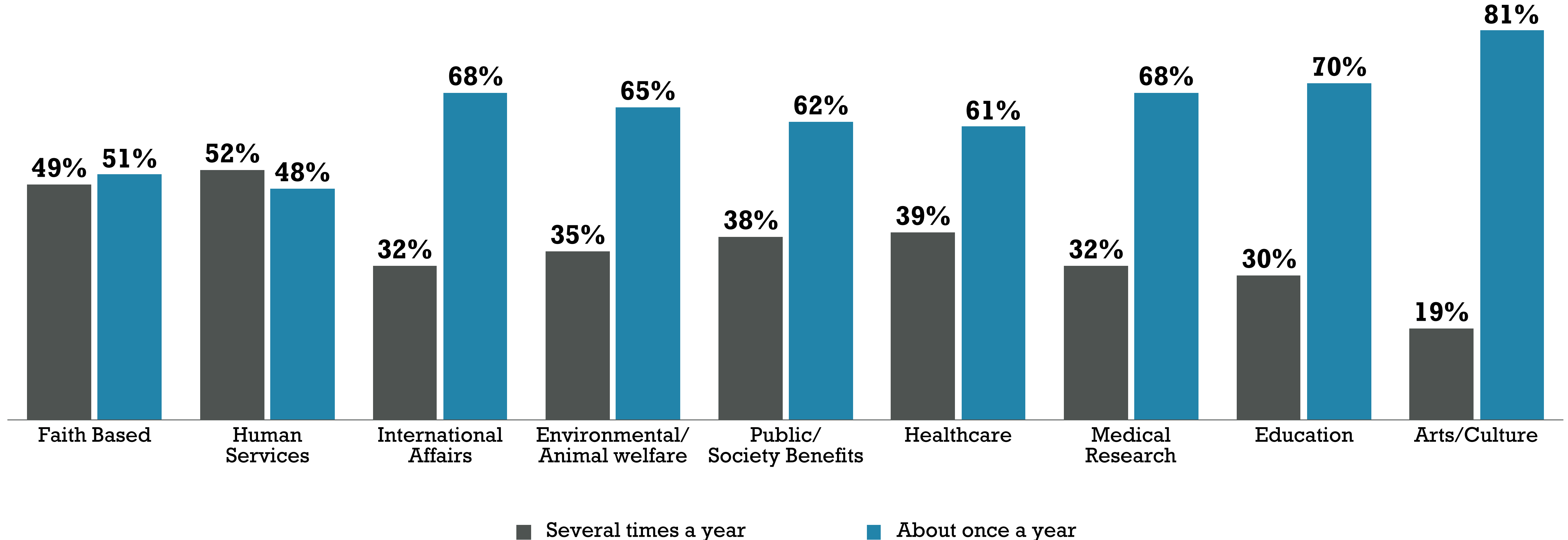
causes you care about most, more today.

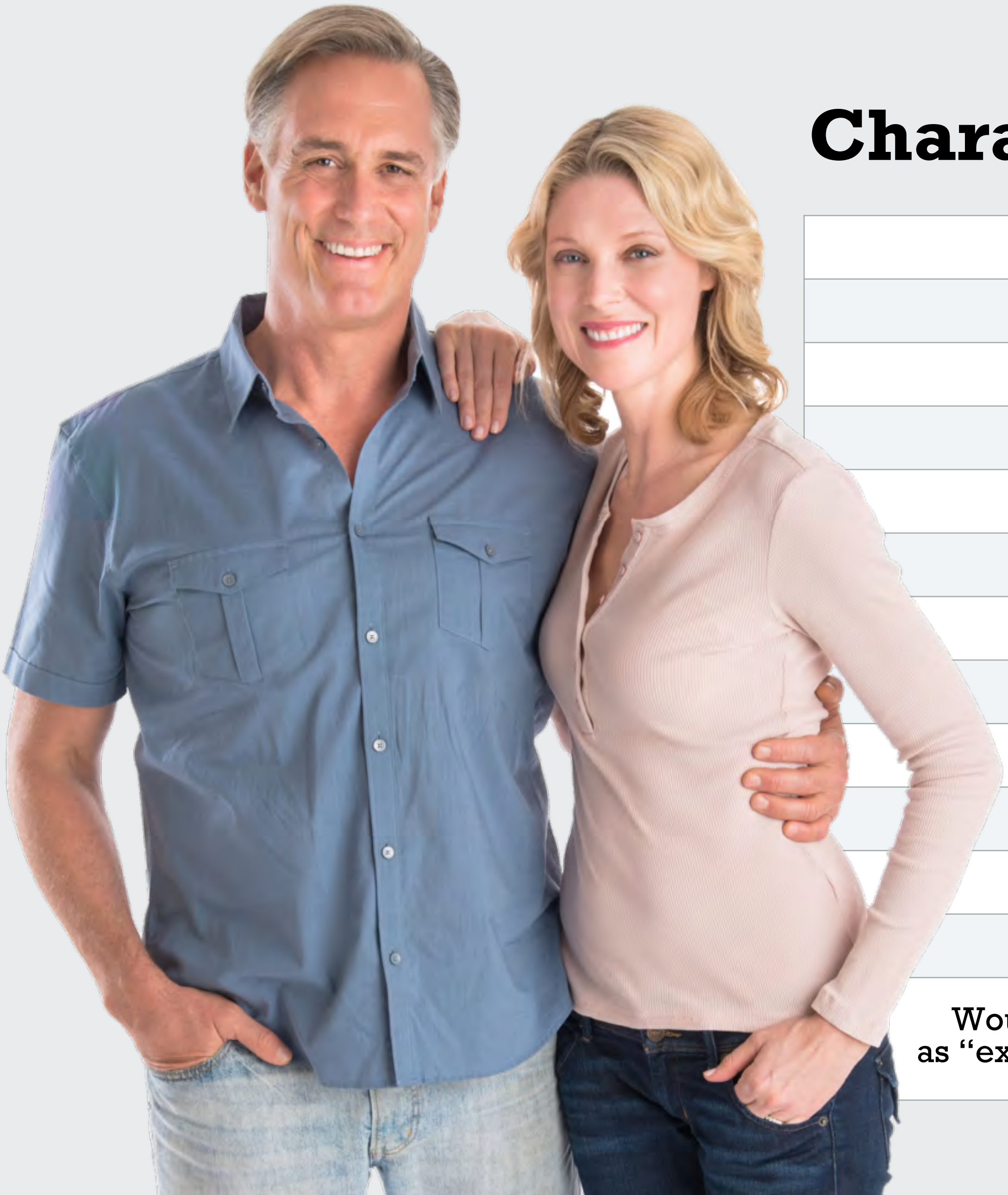
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Difference in Frequency of Donation Across Organizations

% donors indicating how often they donate to the organizations (sorted by 'several times a year')





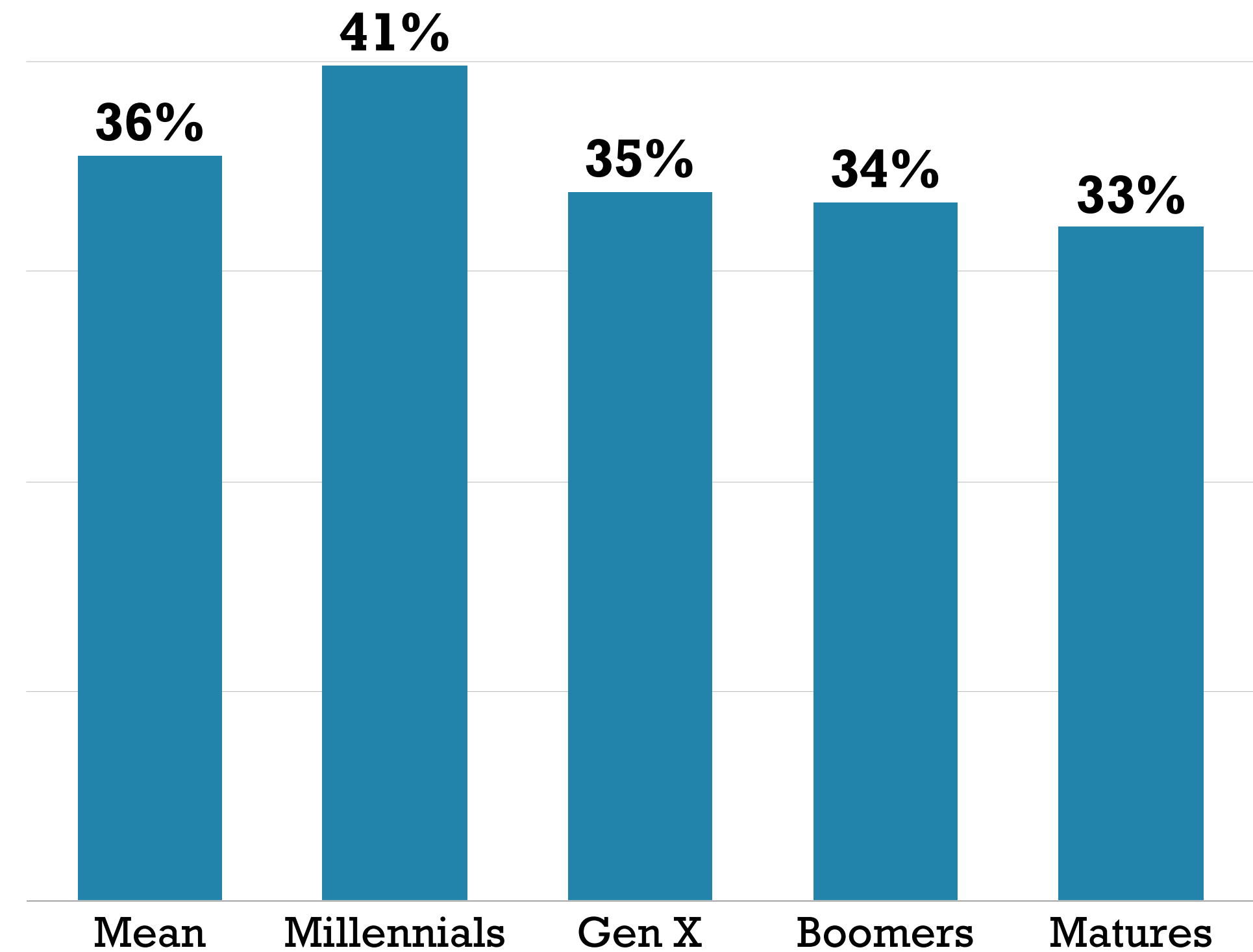
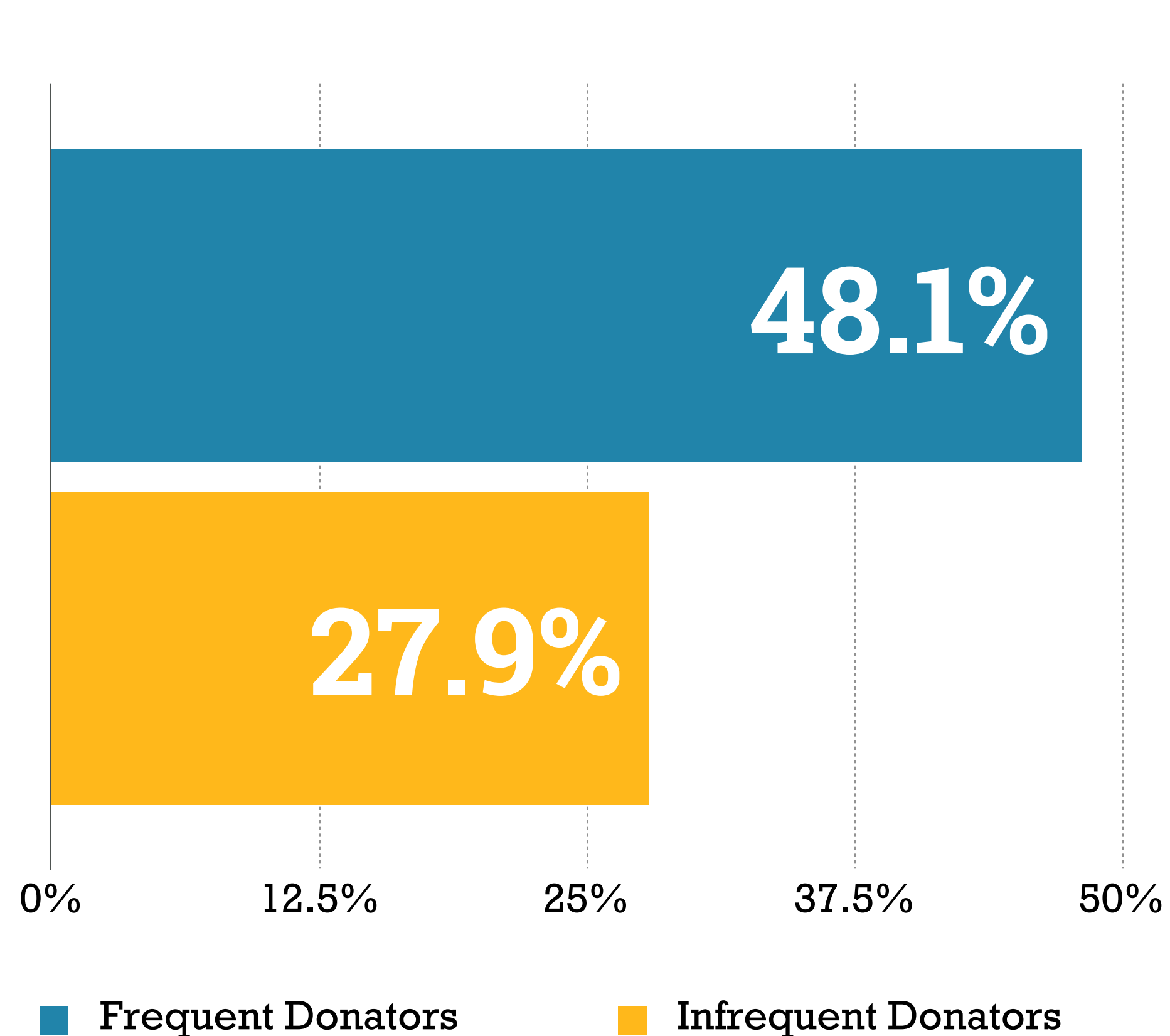
Characteristics of a Frequent Donor

	Frequent Donors	Infrequent Donors
Male	47%	49%*
Female	53%*	51%
Average age	45 yrs. old*	42 yrs. old
Child in HH	47%*	39%
Median income	\$86K	\$53.2K
Median net worth	\$443K	\$262K
College+	40%*	31%
White	77%	75%
Black/AA	12%	15%
Hispanic	15%	16%
Asian	3%	5%
Would describe yourself as "extremely/very social"	38%*	27%

* Denotes significantly higher than corresponding group

Frequent Donors Place Higher Value on Volunteering

% Strongly agree with statement "Volunteer work is an important part of my life."



Millennials are statistically significantly higher than all other groups

Your Gift Saves Animals' Lives

Dear James,

I want to begin by offering you a heartfelt thank you. Your financial support of the Larson County Animal Rescue Group allows us to give a second chance to our community's most vulnerable animals.

Without friends like you who provide financial support, our lifesaving work would not be possible.

We recently achieved a major milestone at Larson County ARG. For 10 consecutive years, we have saved the lives of 100 percent of the healthy animals that have entered our doors. This milestone brings us great pride, but we know that we have much more to do.

While we save thousands of homeless pets each year, whether healthy or in need of medical or behavioral care, there are still thousands more in Larson County in need of our help. We will not rest until we have saved every animal in this community that can be saved.

Sincerely,



Bill Smith
Planned Giving Director
800.331.6881
bill.s@lcareg.org

P.S. You play a key role in strengthening our ability to give so many animals a second chance. Learn about the other ways to make a gift to the Larson County ARG by completing the enclosed survey today!



Larson County
Animal Rescue
Group volunteer

Your Involvement Saves Animals' Lives

Dear Tina,

I want to begin by offering you a heartfelt thank you. Your volunteer support of the Larson County Animal Rescue Group allows us to give a second chance to our community's most vulnerable animals.

Without friends like you who make a gift of time, our lifesaving work would not be possible.

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LARSON COUNTY
animal rescue group

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LARSON COUNTY
animal rescue group

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Larson County
Animal Rescue
Group volunteer

30-Second Survey

LARSON COUNTY
animal rescue group

Please complete and return in the enclosed envelope today. Thank you!

I want to honor a friend or family member with a gift to Larson County Animal Rescue Group.

Name (Please print.)

I want to leave a gift to Larson County Animal Rescue Group in my will or estate plans.

Address

I am not able to give at this time but want to learn more about volunteer options available to me.

City, State

ZIP

Please send me the FREE estate planning guide *Your Personal Planning Road Map*.

Telephone



Thank you for being part of our mission!

Email

We respect your privacy! Information collected here will be kept strictly confidential. It will not be sold, rented, loaned or otherwise disclosed, and it will not be used in ways to which you have not consented.

chance. Learn about the other ways to make a gift to the Larson County ARG by completing the enclosed survey today!



30-Second Survey

LARSON COUNTY
animal rescue group

Please complete and return in the enclosed envelope today. Thank you!

I want to honor a friend or family member with a gift to Larson County Animal Rescue Group.

Name (Please print.)

I want to learn more about leaving a gift to Larson County Animal Rescue Group in my will or estate plans.

Address

I have already included Larson County Animal Rescue Group in my will.

City, State

ZIP

Please send me the FREE estate planning guide *Your Personal Planning Road Map*.

Telephone



Thank you for being part of our mission!

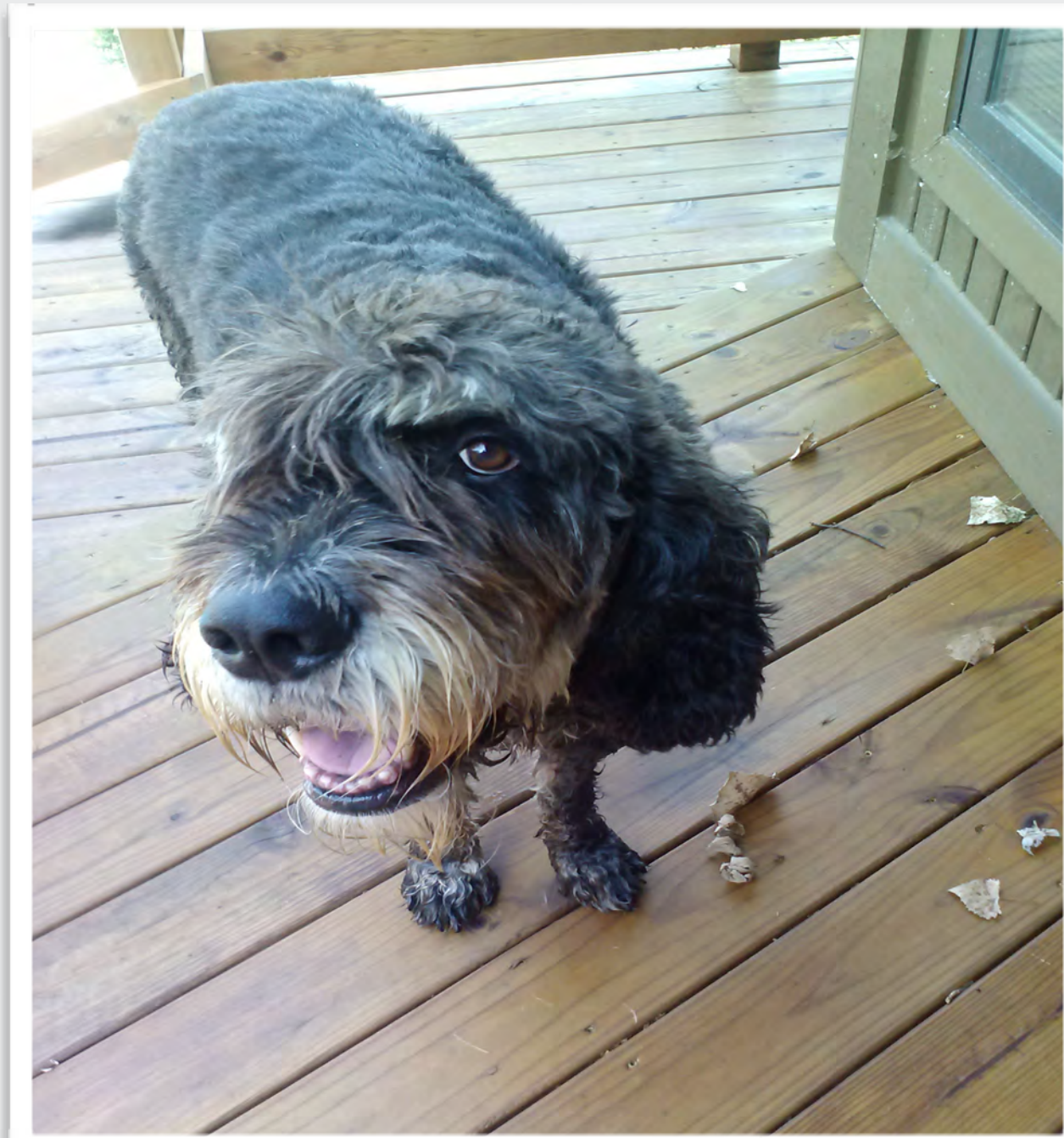
Email

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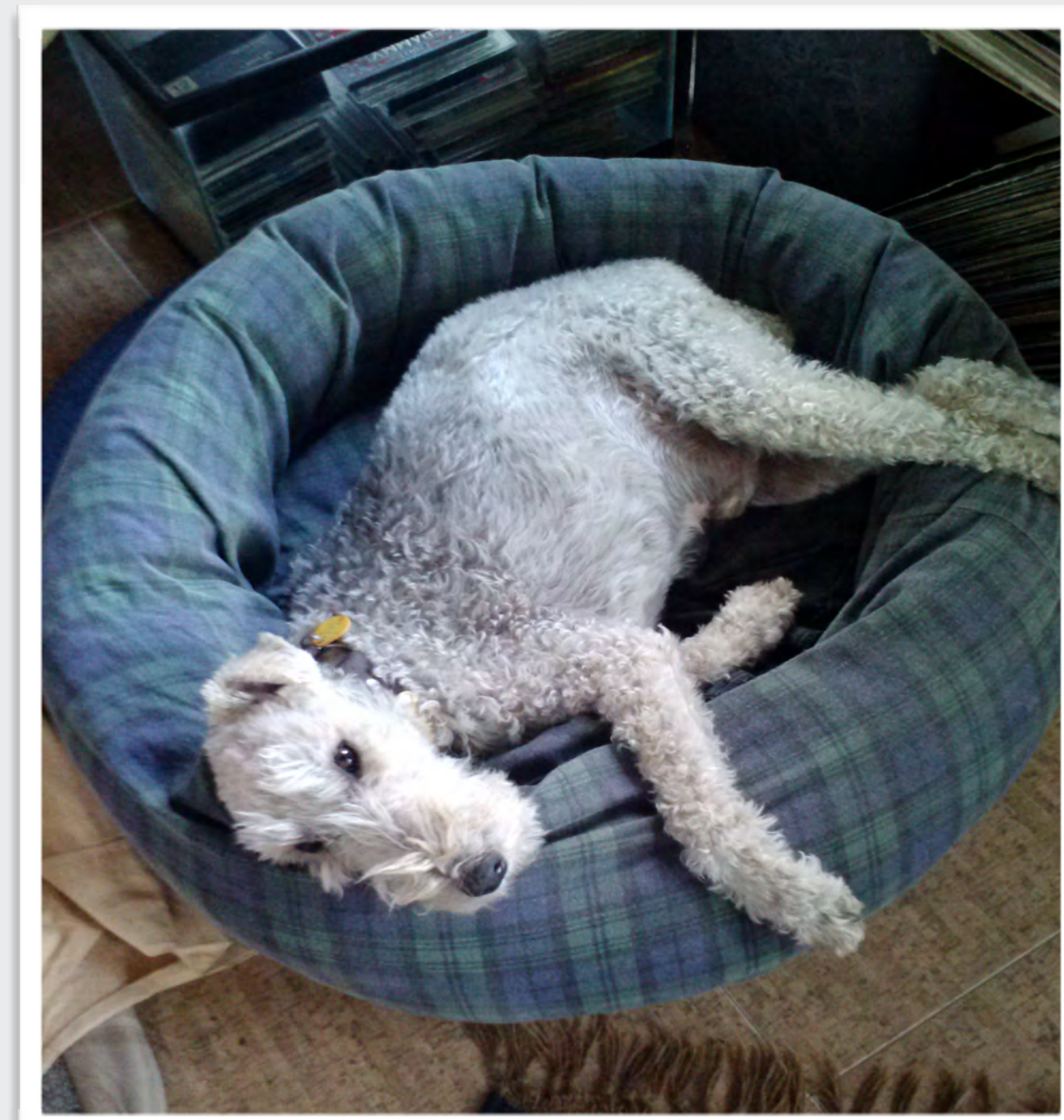
chance. Learn about the other ways to make an impact on Larson County ARG by completing the enclosed survey today!



Frequent Donors are Significantly More Likely Than Infrequent Donors to Own One or More Dogs



47.2%
VS.
42.6%




**HELPING
ANIMALS
PAYS IN
SO MANY
WAYS**



*6 Smart Strategies for
Year-End Giving*





PRESBY'S
INSPIRED LIFE

**HELPING
ANIMALS
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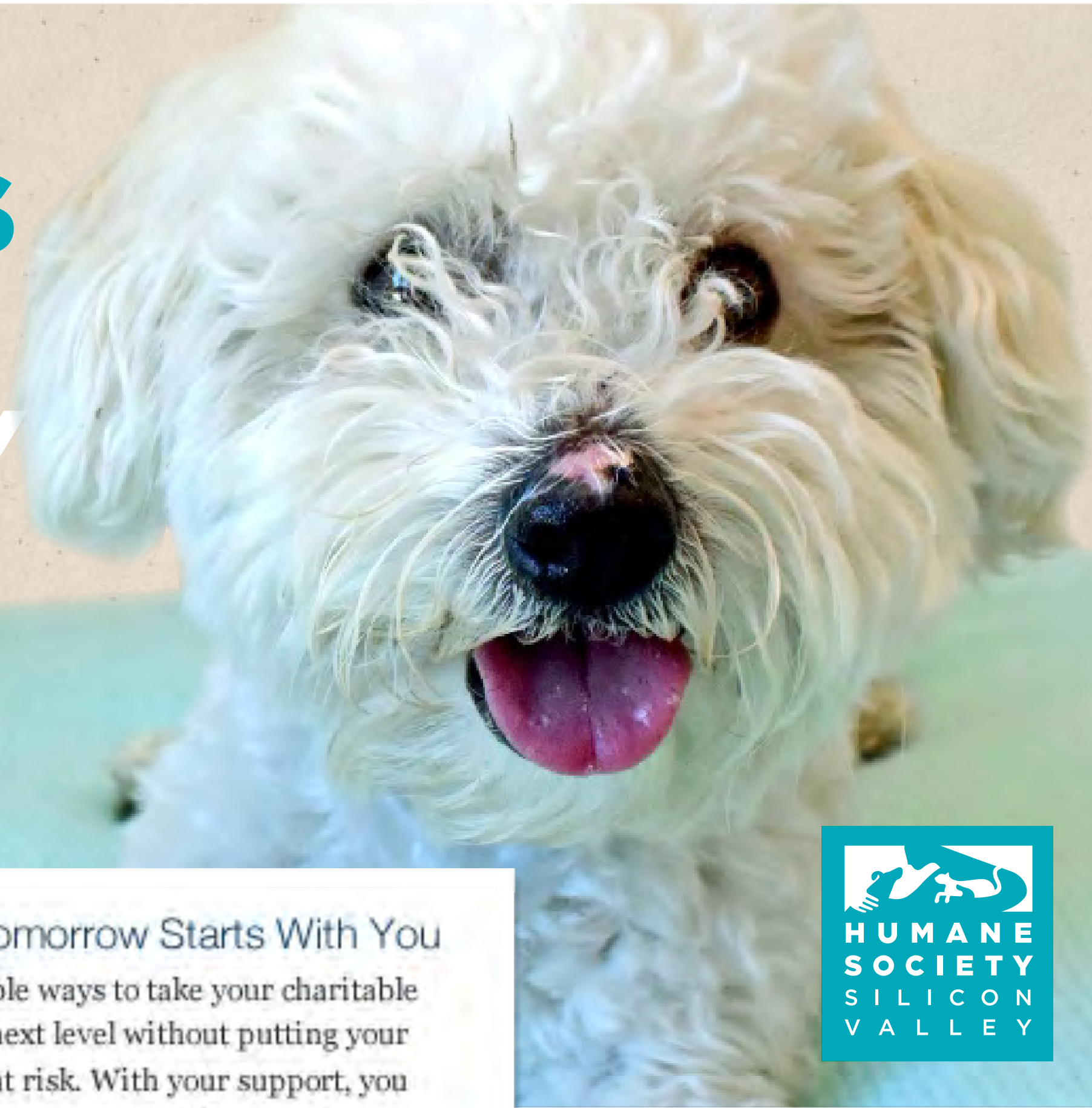


*6 Smart Strategies for
Year-End Giving*




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INSPIRED LIFE

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ANIMALS
PAYS IN
SO MANY
WAYS**




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Discover simple ways to take your charitable legacy to the next level without putting your daily budget at risk. With your support, you can make a big impact on Saint Mary's College of California.

[Learn more](#)

6 Smart Strategies for
Year-End Giving




PRESBY'S
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ANIMALS
PAYS IN
SO MANY
WAYS



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Discover simple ways to take your charitable legacy to the next level without putting your daily budget at risk. With your support, you can make a big impact on Saint Mary's College of California.

[Learn more](#)

Make a Gift and Receive
Payments for Life



THE FOUNDATION FOR
BARNES JEWISH
Hospital
BJC HealthCare

Questions?



Cheryl Sturm
Director of Marketing
cheryl.sturm@stelster.com



Zach Christensen
Creative Director
zach.christensen@stelster.com

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THANK YOU!