

# From Data to Design

How to Apply Stelter's New Research to Your Planned Giving Marketing Materials



## 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 nonprofit'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<sup>®</sup>

## **METHODOLOGY**

- Annual quantitative study since 2005, now with 10 years of trended data
- April 2015 research of U.S. adults comprised of:
  - 3,001 general population sample
    - 35% Millennials
    - 20% Gen X
    - 37% Boomers
    - 8% 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 18-38



## **Gen X**

Born 1965-1976

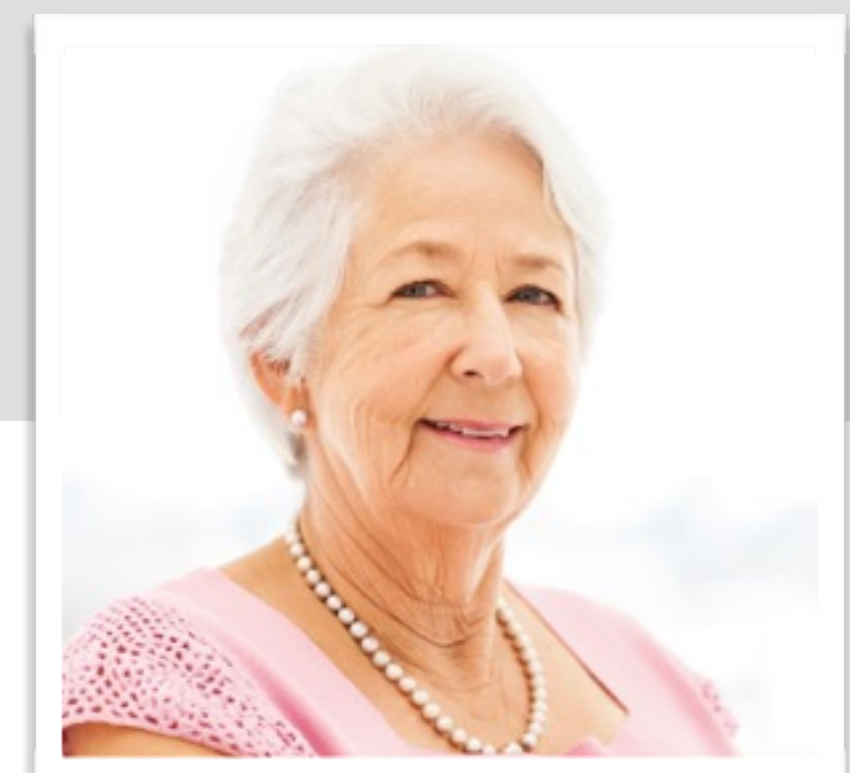
Ages 39-50



## **Boomers**

Born 1946-1964

Ages 51-69



## **Matures**

Born 1900-1945

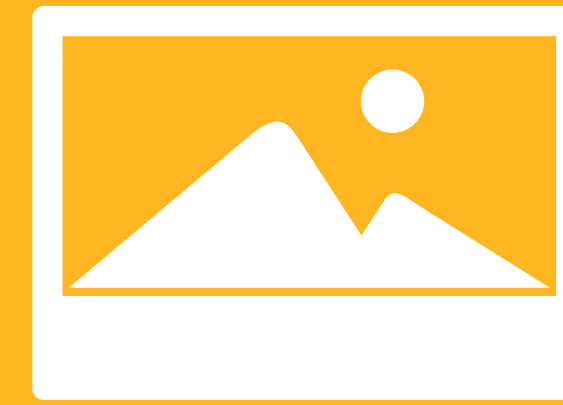
Ages 70+



Audience

Aa

Fonts

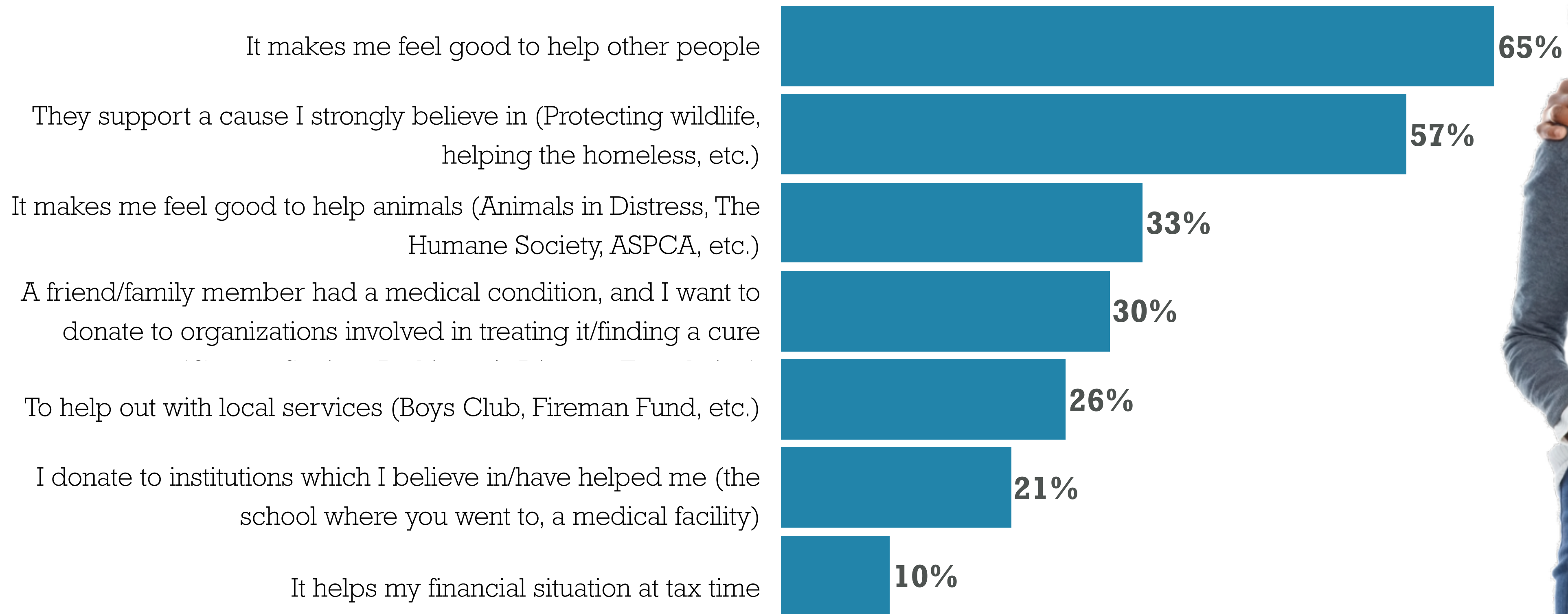


Images



# 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

**A**manda 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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— Amanda Zuleide Maldonado





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**Go Online**

**Discover a Tax-Smart Plan for Your Retirement Accounts**

Visit [unicef.usa.planmylegacy.org/retirement\\_accounts](http://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](mailto: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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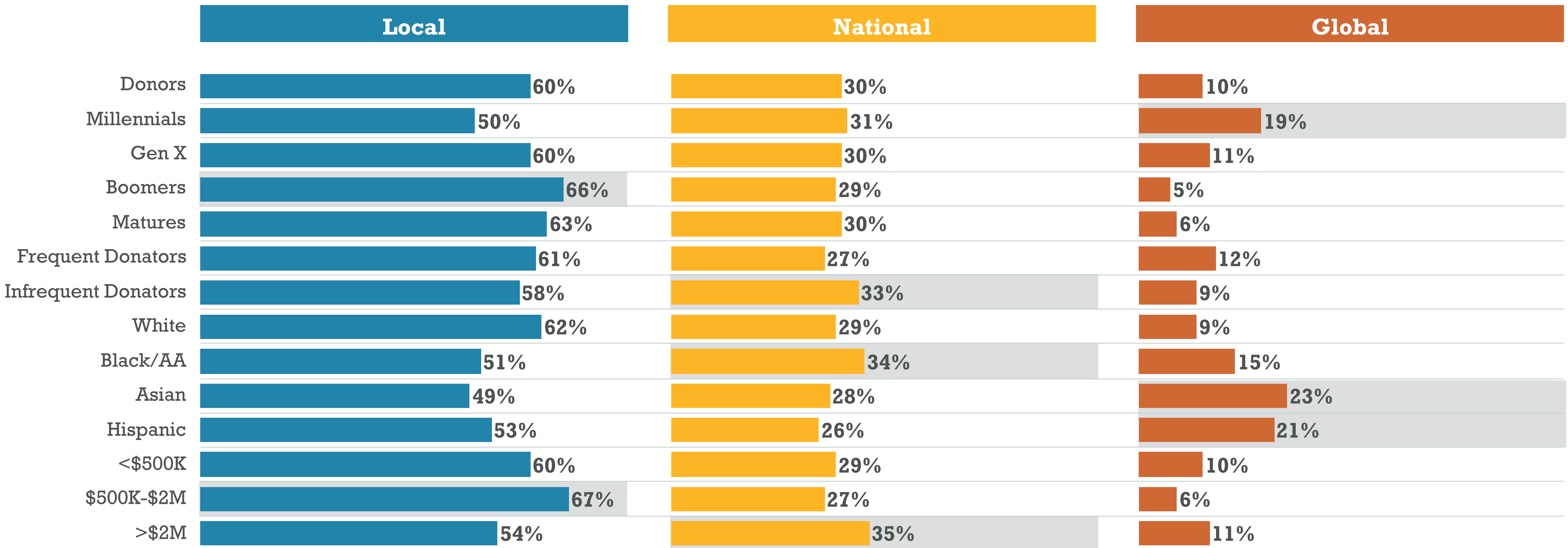
— Jaden's mother



*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



Gray boxes highlight the groups which are high across the types of preferred organizations



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.

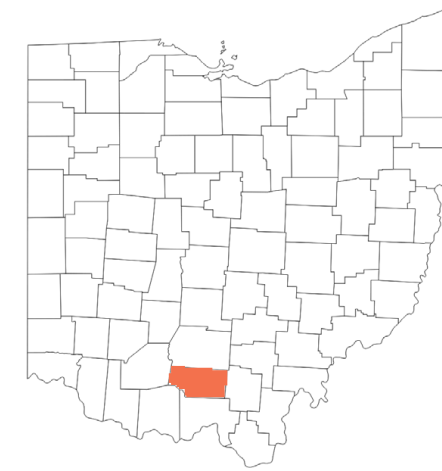
Thank you for all you do to support the Southeastern Ohio Food Bank. Together we can improve the lives of Ohioans by ending hunger.

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*

Mary Anderson  
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.

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,

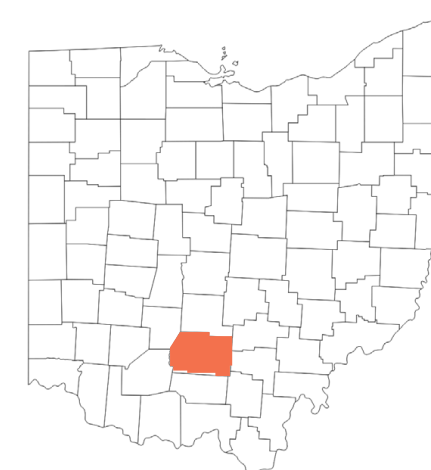
*Mary Anderson*

Mary Anderson  
Planned Giving Officer

P.S. Return the enclosed survey to learn more about how you can help ensure that children in 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.

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Mary Anderson  
Planned Giving Officer

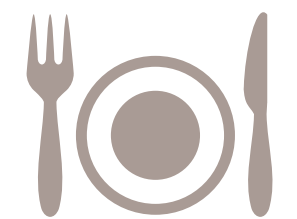
P.S. Return the enclosed survey to learn more about how you can help ensure that children in Jackson County don't go to school hungry.

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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- 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.
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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](http://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

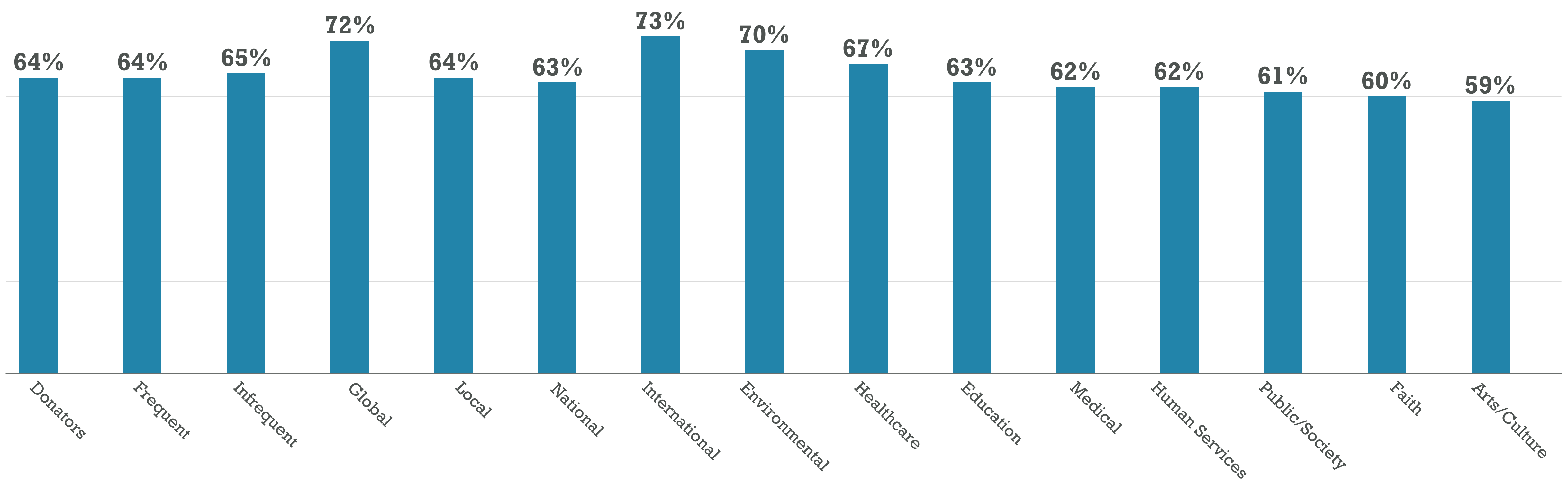
Cassidy K. Titcomb  
Associate Vice President of Advancement  
cassidy.titcomb@ymcatwincities.org

[www.ymcatwincities.org](http://www.ymcatwincities.org)

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

% donors who indicate...

■ Agree with statement   ■ Level of Trust

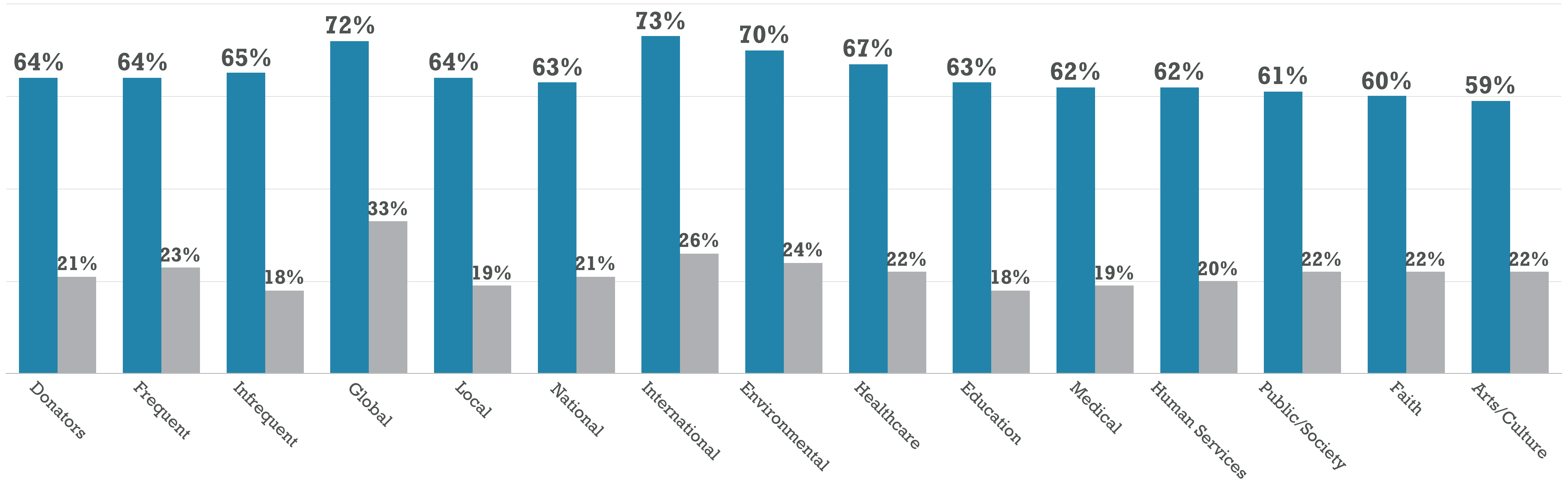




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% donors who indicate...

■ 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 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

HAVE A GREATER IMPACT Today and Tomorrow

Fall 2015

## 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.

**97%** of AmeriCares expenses directly support programs and relief for people in need.

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](http://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	28%	121	116	97	114	93	103	81	106	131
Friends/relatives	16%	89	102	83	120	101	109	83	126	98
Internet/websites	13%	113	97	136	68	108	102	157	98	83
Spouse/significant other	8%	108	60	108	141	89	99	93	97	127
Nonprofit organization employee	6%	128	84	87	58	107	84	101	97	99
Television/radio advertisements	6%	49	62	86	62	117	104	121	86	62
Direct mail (from post office)	5%	85	121	104	138	122	109	84	111	67

\* 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.

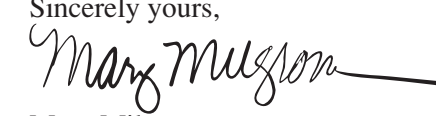
Over the past year, the National MS Society distributed nearly \$260 million to support ground-breaking research and to provide critical services and information. We thank you for your support which made this progress possible; the exciting advances that are underway this year demonstrate the impact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

**D**id 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](http://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

**M**ore 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


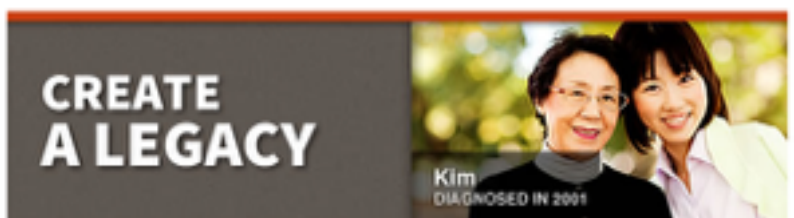
If you're interested in this tax-efficient form of giving and would like to name the Society as beneficiary, simply contact your retirement plan administrator for a change-of-beneficiary form. Decide what percentage you would like us to receive and name us, along with the percentage you chose, on the 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 at 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 Baranick 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 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](mailto: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](http://www.nationalmssociety.org) or 1-800-344-4867.



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

Ages 40-54

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

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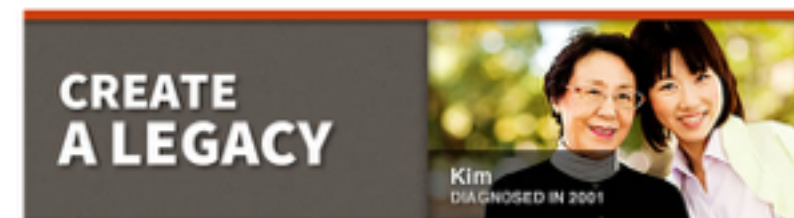
National MS Society respects your online time and privacy. If you no longer wish to receive this planned giving eNewsletter, please click [opt out](#).

Ages 55-69

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

NMSS  
Tuesday, March 31, 2015 at 10:05 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**  
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[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](#)
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**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 eNewsletter, please click [opt out](#).

Ages 70+



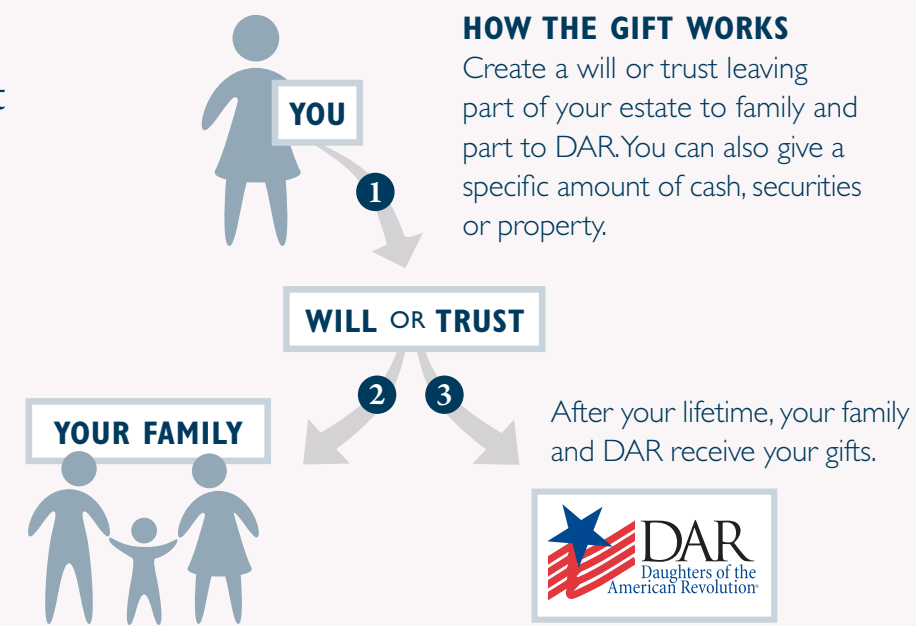


## Leave the Last Slice for Us

★ 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](http://www.ouramericanlegacy.org).



*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](http://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](mailto: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.*






- 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](#)



“I am Comfortable Using New Technologies and Devices.”



**General  
Population**

81.4%



**Millennials**

91.3%



**Gen X**

85.4%



**Boomers**

73%



**Matures**

66.8%



Which of the Following Activities Do You Participate in on a Regular Basis?

**Surfing the Internet**



**General  
Population**

77.2%



**Millennials**

79.5%



**Gen X**

79.3%



**Boomers**

76.6%



**Matures**

65.3%



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
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- Gifts That Provide Income

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  - 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](mailto: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](#)

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Share:





## Giving & Development

GIVE ONLINE

Ways to Give The MC Fund **Planned Giving** Giving Societies Foundation Board Scholarship Banquet Development Staff

### Turn Your Gift Into an Opportunity

Graduates of Mississippi College stand out among peers in their fields thanks to the hands-on experiences, top-notch faculty, and ongoing developments in our programs and facilities that are afforded by your generosity. When you extend your support of Mississippi College through your long-term estate or financial plans, your special relationship with the college will continue as a part of your legacy for years to come. Use the tools and resources below to get your giving plan started.

### Begin My Giving Journey



GIVING AMOUNT



AGE



ASSETS

### Planned Giving

- > Popular Ways to Give
  - Wills and Living Trusts*
  - Beneficiary Designations*
- > Gifts That Provide Income
  - Charitable Gift Annuities*
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- > Eager Legacy Society
- > For Professional Advisors
- > Contact Us



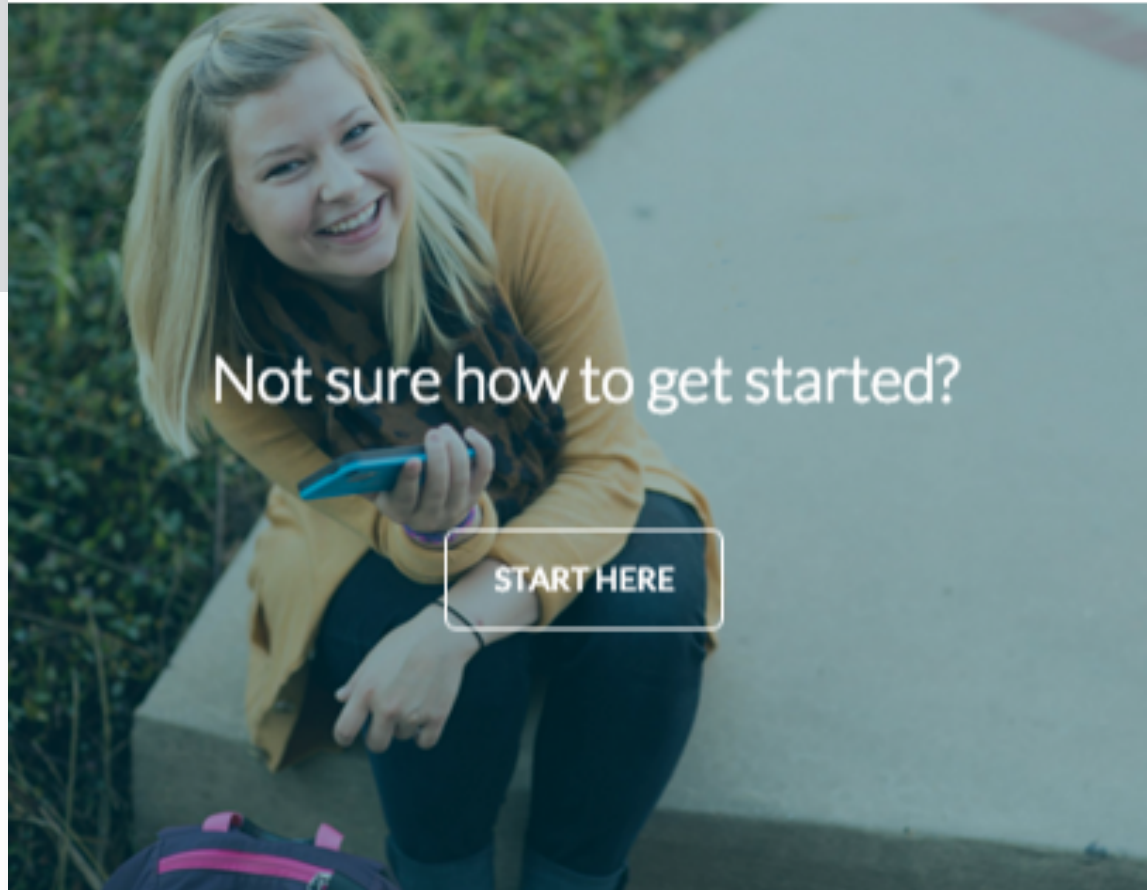
GIVING AMOUNT

AGE

ASSETS

- > For Professional Advisors
- > Contact Us

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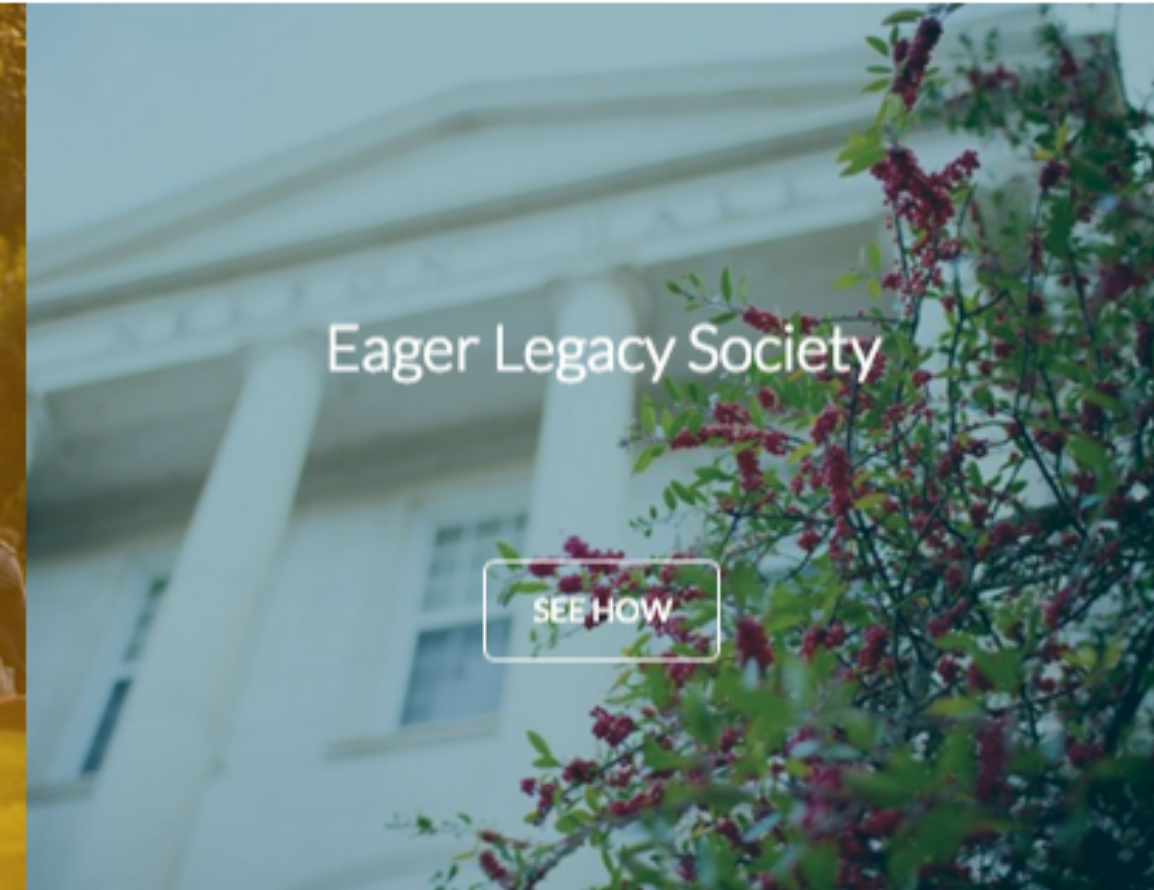
Not sure how to get started?

START HERE



What's New?

VIEW ALL ARTICLES



Eager Legacy Society

SEE HOW

Prospective Students

Admissions

Tuition & Financial Aid

Majors & Degrees

Schedule a Visit

Apply

Current Students

Academic Calendar

Academic Catalogs

Library

Faculty Webpages

Pay Tuition Bill

Faculty & Staff

Committees & Councils

Faculty & Staff Meetings

University Policies

Strategic Planning

Institutional Research

Parents & Community

Parent Resources

MC at a Glance

Continuing Education

Event Services

Maps

Alumni & Friends

Get Involved

MC Athletics

Beacon Magazine


Giving & Development

Alumni Chapters






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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  
[ddhg@stmarys-ca.edu](mailto:ddhg@stmarys-ca.edu)

Saint Mary's College of California | 1928 Saint Mary's Road, PMB 4300 | Moraga, CA 94575  
Saint Mary's College of California respects your online time and privacy. If you no longer wish to receive this planned giving eNewsletter, please click [opt out](#).  
[Update Profile](#)


Under 40

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[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](#)




**I'm Here to Help**  
Douglas D. Hansen  
Planned Giving Officer  
(925) 631-4218  
[ddhg@stmarys-ca.edu](mailto:ddhg@stmarys-ca.edu)

Saint Mary's College of California | 1928 Saint Mary's Road, PMB 4300 | Moraga, CA 94575  
Saint Mary's College of California respects your online time and privacy. If you no longer wish to receive this planned giving eNewsletter, please click [opt out](#).  
[Update Profile](#)


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.



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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.




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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](#)




**I'm Here to Help**  
Douglas D. Hansen  
Planned Giving Officer  
(925) 631-4218  
[ddhg@stmarys-ca.edu](mailto:ddhg@stmarys-ca.edu)

Saint Mary's College of California | 1928 Saint Mary's Road, PMB 4300 | Moraga, CA 94575  
Saint Mary's College of California respects your online time and privacy. If you no longer wish to receive this planned giving eNewsletter, please click [opt out](#).  
[Update Profile](#)


Ages 55-69

To view this email as a Web page, click [here](#). Forward to a friend:




# 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](#)



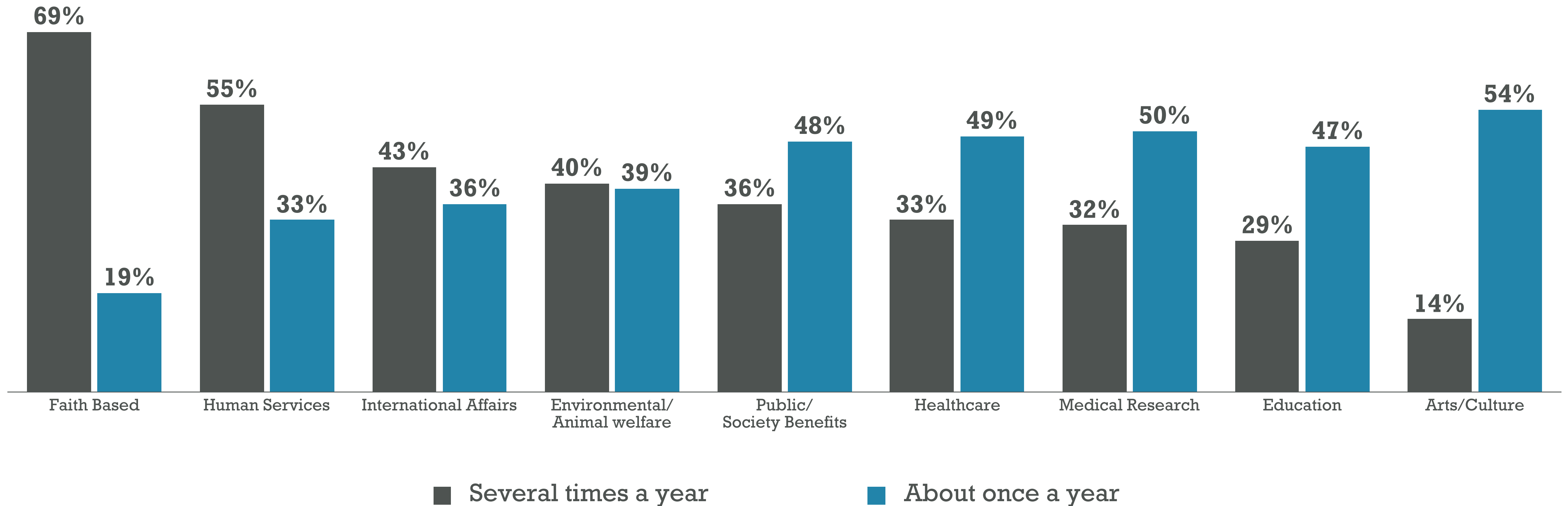
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Ages 70+

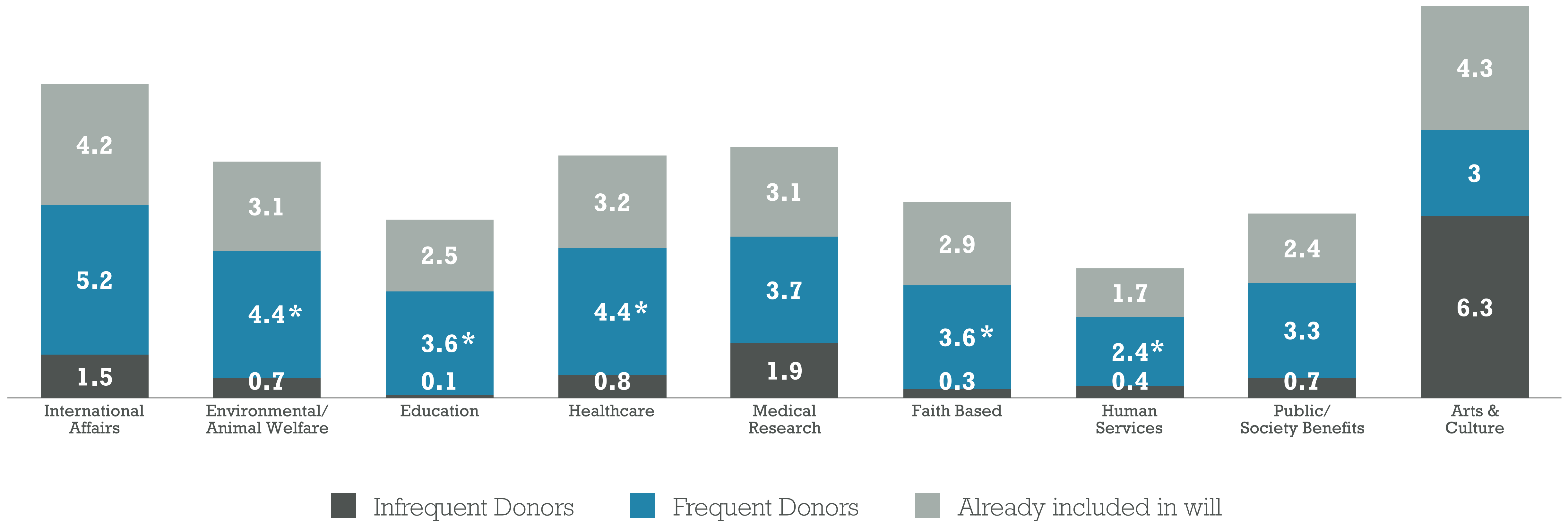
# Difference in Frequency of Donation Across Organizations

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





## Frequent Donors Are More Likely to Leave a Charitable Gift at the Time of Their Death



\* Indicates a statistically significant difference

# Characteristics of a Frequent Donor



	<b>Frequent Donors</b>	<b>Infrequent Donors</b>
Male	45%	50%*
Female	55%*	50%
Average age	49 yrs. old*	47 yrs. old
Child in HH	44%*	34%
Median income	\$68.5K	\$53.2K
Median net worth	\$104.1K	\$47.6K
College+	36%*	28%
White	81%	78%
Black/AA	11%	12%
Hispanic	14%	12%
Asian	3%	4%
Would describe yourself as "extremely/very social"	42%*	32%

\* Denotes significantly higher than corresponding group





Veterans of Foreign Wars VFW

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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.

[HEROES.VFW.ORG/ESTATEPLANNING/FORM](https://HEROES.VFW.ORG/ESTATEPLANNING/FORM)

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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 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:

Address 2:

\* City/State/ZIP:  City  State  ZIP

Download My FREE Estate Planning Course Lesson Book Today »



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causes you care about most, more today.

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### 1 Simple Thing YOU

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## Class Is



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\* Email:

Address 1:

Address 2:

\* City/State:

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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.

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## 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.

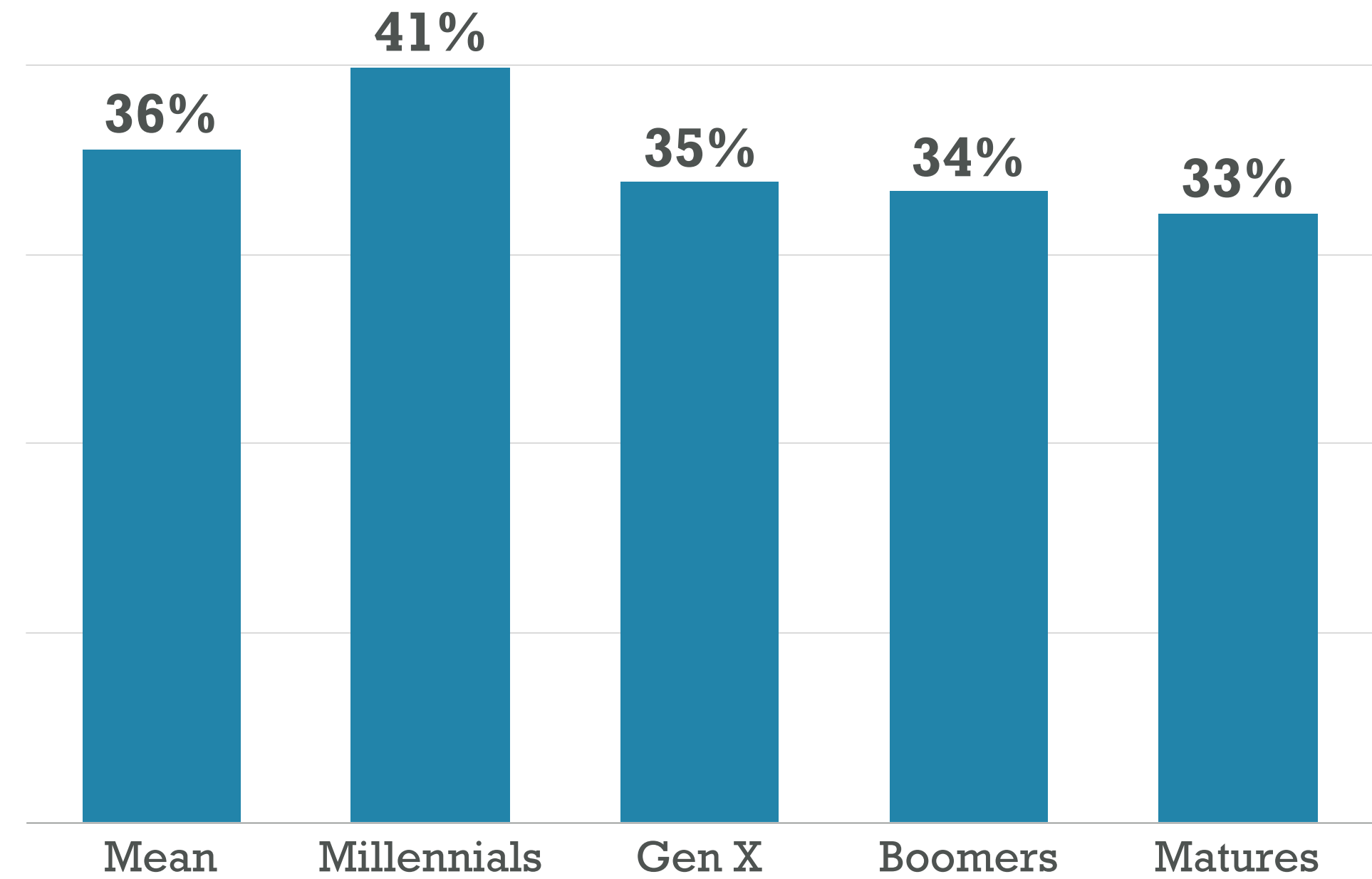
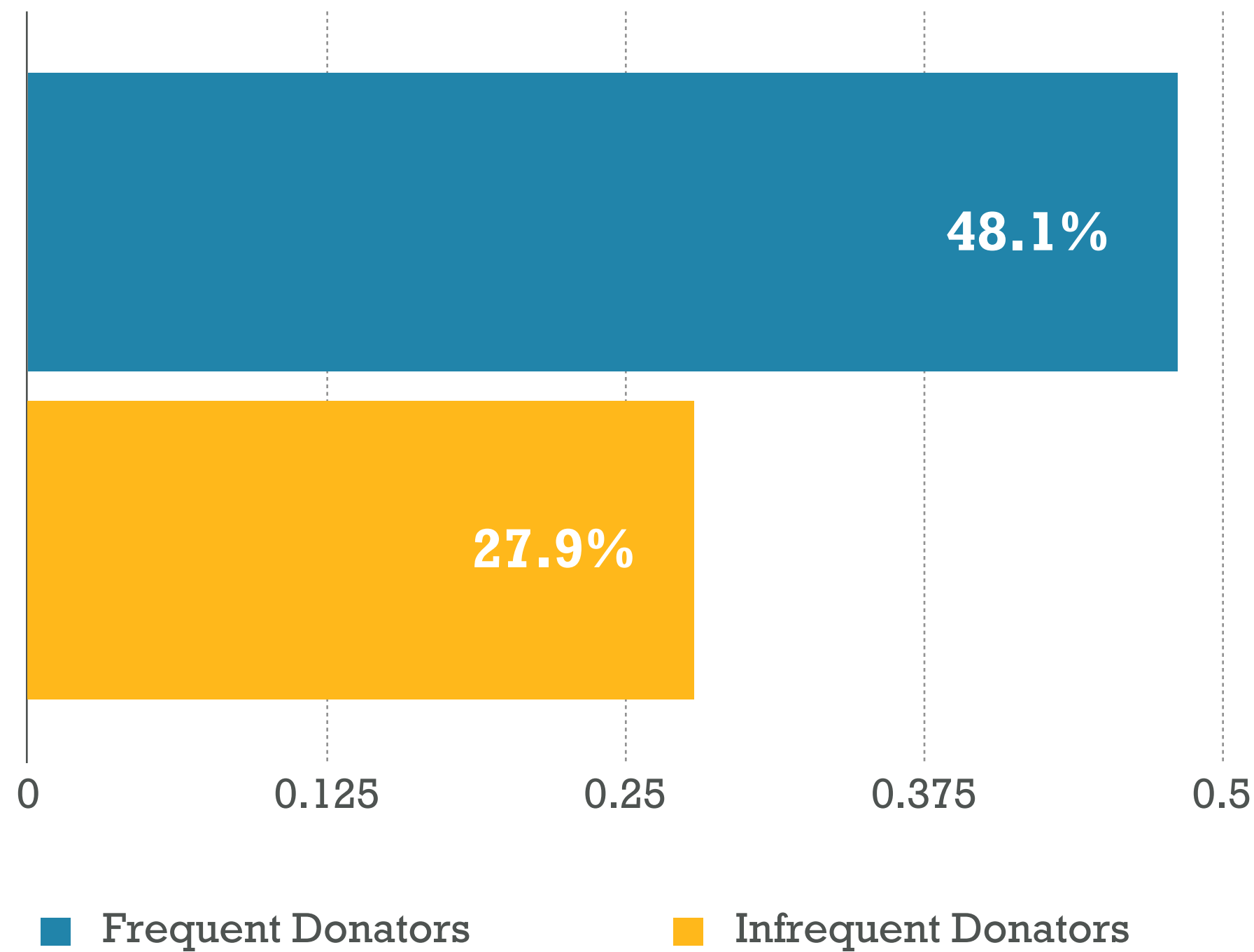
Boost Post





# 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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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.

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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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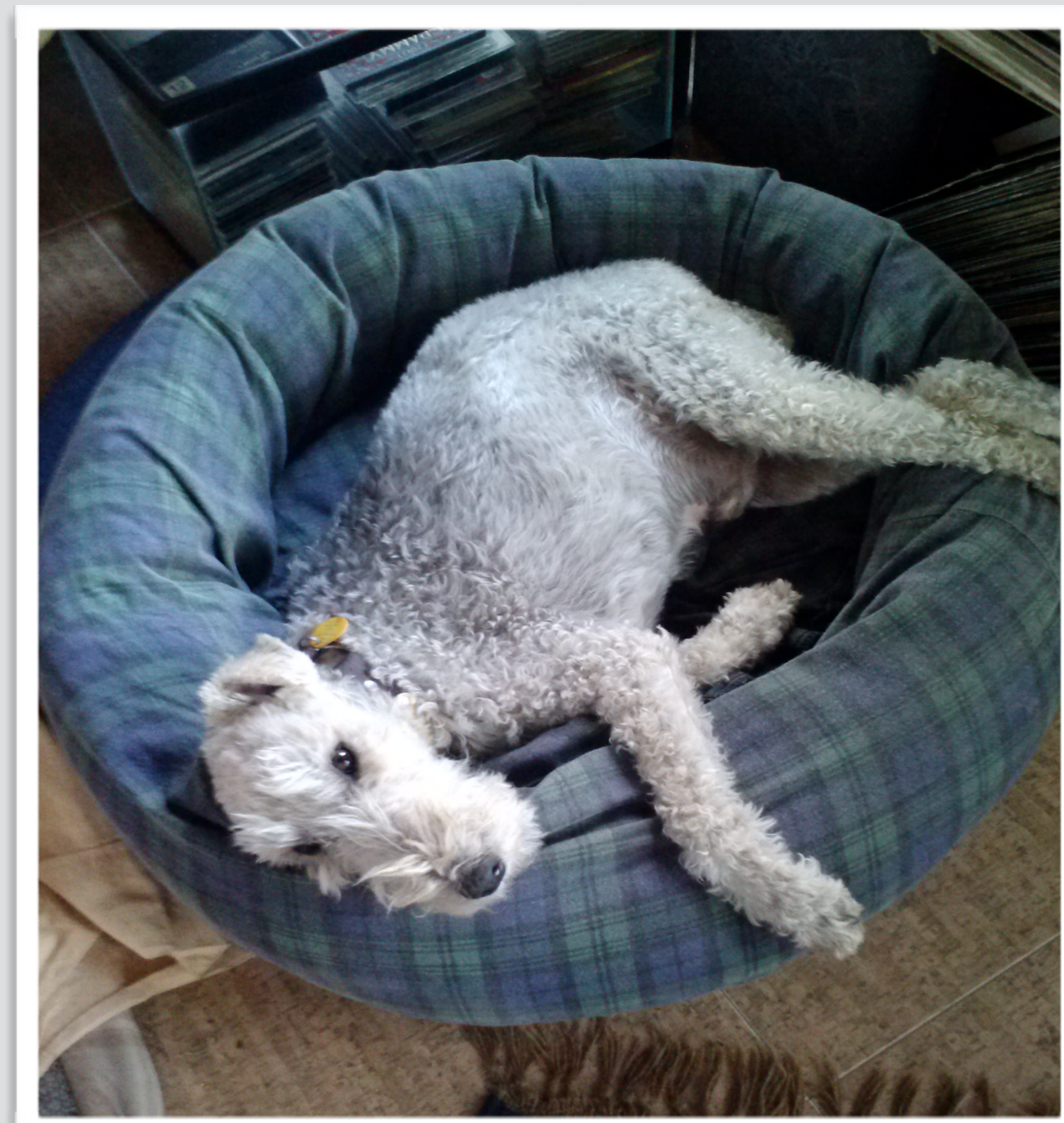




## Frequent Donors Are Significantly More Likely Than Infrequent Donors to Own One or More Dogs



47.2%  
vs.  
42.6%






**HELPING  
ANIMALS  
PAYS IN  
SO MANY  
WAYS**





*6 Smart Strategies for  
Year-End Giving*



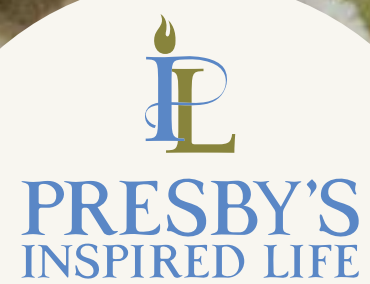
  
**PRESBY'S**  
INSPIRED LIFE

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ANIMALS  
PAYS IN  
SO MANY  
WAYS**





*6 Smart Strategies for  
Year-End Giving*



**HELPING  
ANIMALS  
PAYS IN  
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**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](#)



6 Smart Strategies for  
Year-End Giving



  
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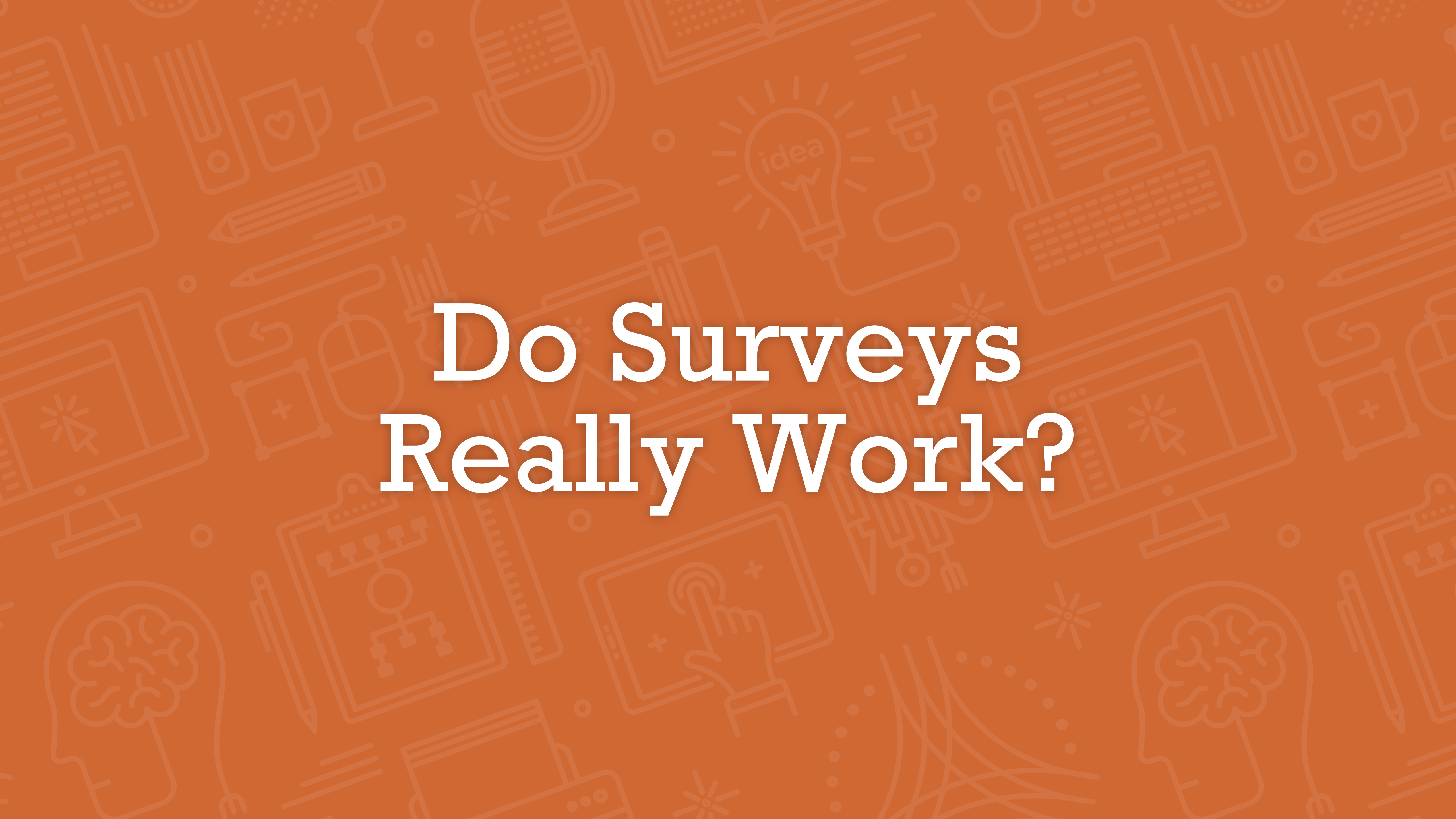
[Learn more](#)

Make a Gift and Receive  
Payments for Life



THE FOUNDATION FOR  
**BARNES JEWISH**  
Hospital  
BJC HealthCare





# Do Surveys Really Work?



## COLORADO COLLEGE



April 2015

Dear Ian,

Greetings from the Rockies! After living in Los Angeles for many years, it's a joy to be back in Colorado to reconnect with faculty and experience the mountains in their seasonal splendor.

I am writing to introduce myself and ask for your help.

I graduated from CC in 1978 with a bachelor's degree in political science and completed an MBA in finance at Claremont Graduate University in 1986. My professional expertise, which spans several decades in financial services, involves working with nonprofit institutions, philanthropists and families to devise philanthropic strategies to optimize their intentions.

When CC called me to rekindle the gift planning program, how could I refuse?

One of the things I love most about my new role is meeting fellow alumni and hearing their stories. At the core, there is usually a faculty member, coach, friend or classmate who challenged them to become who they are today. We would love to hear about your connection to the College and learn what is important to you. Please take a few moments to share your thoughts about CC in the enclosed survey.

Recently, the gift planning website, [www.ColoradoCollege.edu/giftplanning](http://www.ColoradoCollege.edu/giftplanning), has undergone changes to make room for wonderful stories about Colorado College alumni, friends, faculty and families who share how CC experiences have contributed to the richness of their lives. There's room for your story there too, if you want to share with the CC community!

**When you return this survey, we will enter you in the drawing to win a copy of *Arranging Gershwin: Rhapsody in Blue and the Creation of an American Icon*, written by Assistant Professor of Music Ryan Raul Bañagale '00.** We will also be giving away some great Colorado College items to a lucky few.

Thank you for helping us to create a robust gift planning program that will ensure a strong future for Colorado College for generations to come. I am always here to answer any questions you may have. I look forward to hearing from you soon.

All the best,

Nancy Baxter '78, CIMA®  
Director of Gift Planning  
[nancy.baxter@coloradocollege.edu](mailto:nancy.baxter@coloradocollege.edu)  
(719) 389-6231

COLORADO C

April 2015

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Greetings from the Rockies! After living in Los Angeles for many years, I am excited to reconnect with faculty and experience the mountains in their season.

I am writing to introduce myself and ask for your help.

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When CC called me to rekindle the gift planning program, how excited I was to be part of the team.

One of the things I love most about my new role is meeting fellow faculty members. In the core, there is usually a faculty member, coach, friend or classmate that you connect with. We would love to hear about your connection to Colorado College and how you feel about it to you. Please take a few moments to share your thoughts about your experience.

Recently, the gift planning website, [www.ColoradoCollege.edu/giftplanning](http://www.ColoradoCollege.edu/giftplanning), has a new section for alumni to share how CC experiences have contributed to the richness of their lives. We would love to hear if you want to share with the CC community!

**When you return this survey, we will enter you in the drawing for a copy of *Arranging Gershwin: Rhapsody in Blue and the Creation of an American Icon* by Professor of Music Ryan Raul Bañagale '00.** We will also be entering you into a drawing for a gift planning item to a lucky few.

Thank you for helping us to create a robust gift planning program for Colorado College for generations to come. I am always here to answer your questions. I look forward to hearing from you soon.

All the best,

Nancy Baxter '78, CIMA®  
 Director of Gift Planning  
[nancy.baxter@coloradocollege.edu](mailto:nancy.baxter@coloradocollege.edu)  
 (719) 389-6231

WE WANT TO HEAR FROM YOU

{CHECK ALL THAT APPLY}

WHEN DID YOUR RELATIONSHIP WITH CC BEGIN? \_\_\_\_\_

WHAT STANDS OUT MOST TO YOU ABOUT YOUR CC EXPERIENCE?

- Student-faculty relationships
- Analytical/intellectual framework
- Athletics
- Greek life
- Lifelong friendships
- Adventures in the Rockies
- Other \_\_\_\_\_

WAS THERE AN INFLUENTIAL PERSON IN YOUR LIFE WHO INSPIRED YOUR APPRECIATION FOR CC?

- Friend
- Faculty
- Family
- Spouse
- Children
- Colleague
- Other \_\_\_\_\_

WHAT TYPE OF INFORMATION MOST INTERESTS YOU?

- Key CC accomplishments—faculty, students, alumni, athletics
- Faculty first-person account
- Where did it go? Impact stories
- Retirement planning
- Strategic philanthropy
- Estate and tax updates
- Other \_\_\_\_\_

WHAT ABOUT CC'S FUTURE MOST INTERESTS YOU?

- Its leadership position as one of the finest liberal arts colleges in the country
- Reinvigorating the library for the future of learning
- Scholarships that attract promising students every year
- Faculty endowment and support to attract and retain leading scholars
- Innovative opportunities for students to explore and gain experience
- Other \_\_\_\_\_

HOW DO YOU LIKE TO ENGAGE WITH CC?

- Email
- Direct mail
- Events on campus
- Alumni travel program
- Local alumni events—social
- Local alumni events—continuous learning
- Volunteer
- Other \_\_\_\_\_

HOW IMPORTANT IS IT TO PROVIDE THE FINEST LIBERAL ARTS EDUCATION TO FUTURE CC GRADS?

- Critical
- Important
- Moderately important
- It's not a big concern of mine
- Not sure

CONTINUED ON BACK



Please include me in the drawing for *Arranging Gershwin: Rhapsody in Blue and the Creation of an American Icon*, by Assistant Professor of Music Ryan Raul Bañagale '00.





# Questions?



**Cheryl Sturm**  
Director of Marketing  
[cheryl.sturm@stelster.com](mailto:cheryl.sturm@stelster.com)



**Zach Christensen**  
Creative Director  
[zach.christensen@stelster.com](mailto:zach.christensen@stelster.com)



# From Data to Design

In a few days you will receive an email giving you instructions on how to access:

- The recording
- The presentation slides
- [www.stelter.com/webinars](http://www.stelter.com/webinars)

**THANK YOU!**