



2013 Stelter Insight Report

Metrics That Matter

The Links Between Advisors,
Donors and Nonprofits

Presenters



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Development
The Stelter Company



Purpose

Describe the advisor population
Understand advisor/donor/nonprofit relationships
Identify barriers and opportunities



Our Methodology

Sample frame

All AEP[®] (Accredited Estate Planner[®]) designees

Approximately 1,704 total



Our Methodology

Sample size

657 AEP[®] designees completed the survey

293 through the Web version

364 through the direct mail version



Our Methodology

Response rate

39%



Our Methodology

Field dates

May 23 through Aug. 19, 2013



Our Methodology

Margin of error

± 3.8 percentage points on full sample of 657

CHAPTER ONE

Estate Planner Profile



Gender



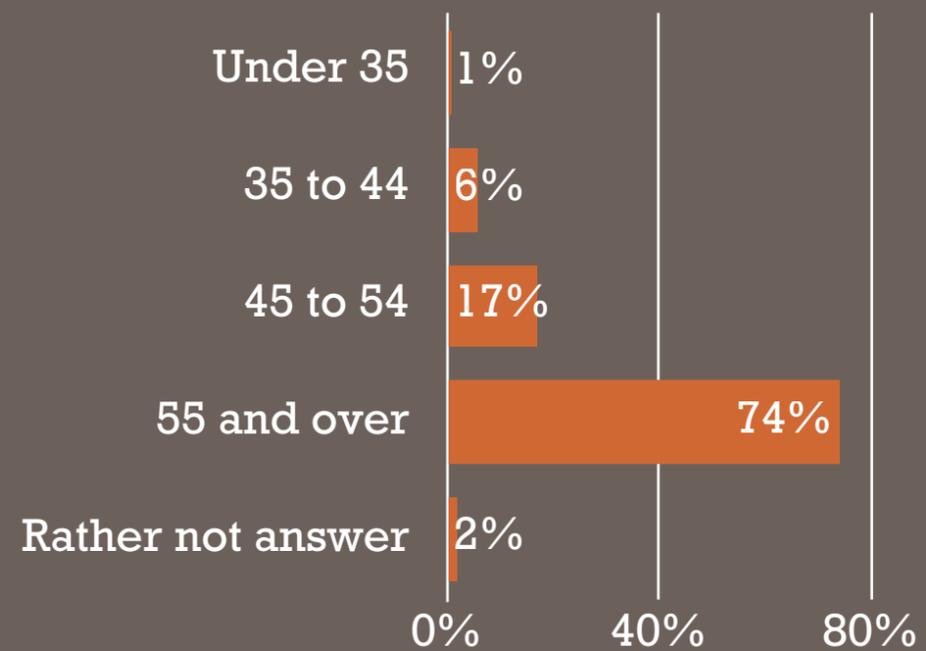
83%



16%

1% RATHER NOT ANSWER

Age

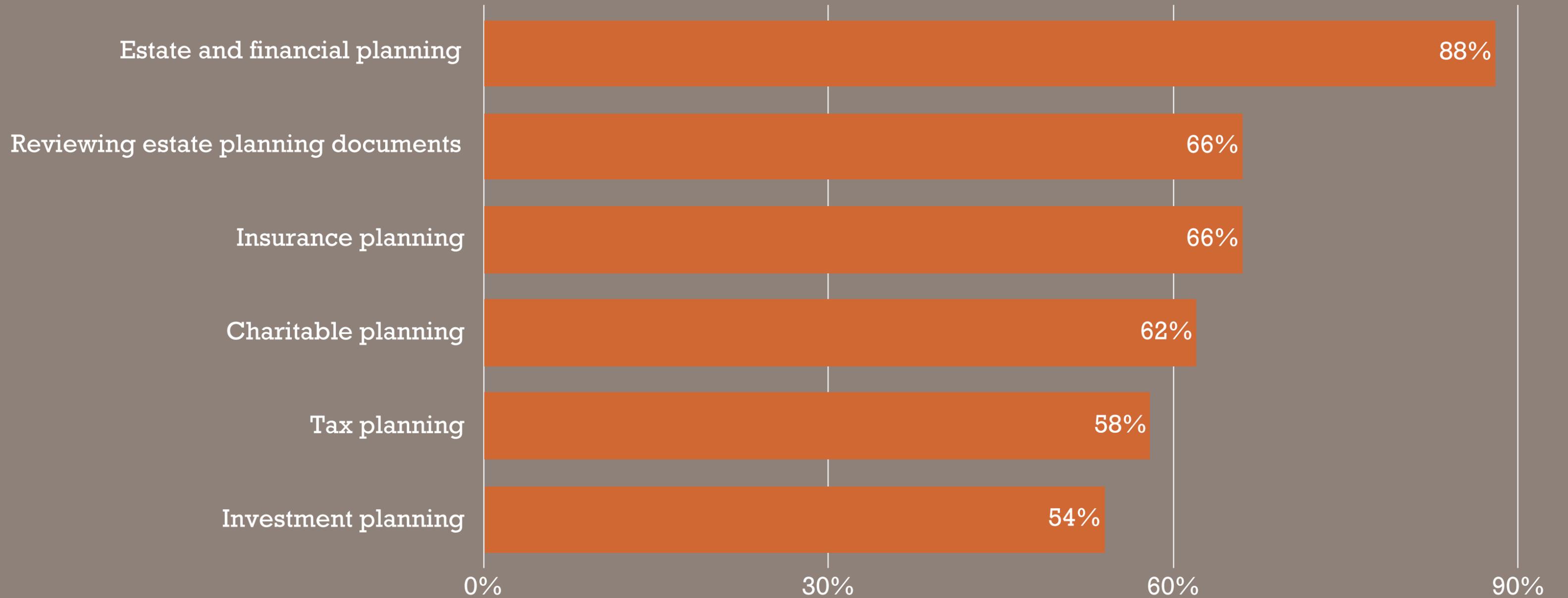


Professional Designations



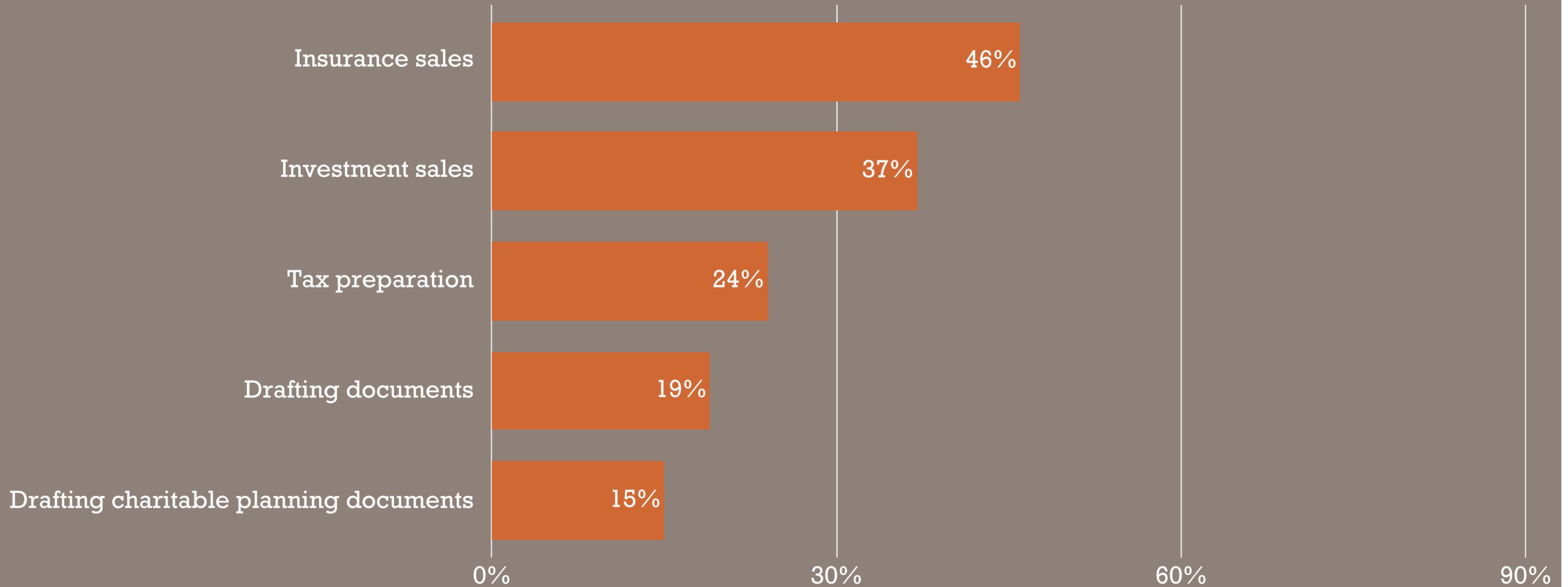


Services regularly provided



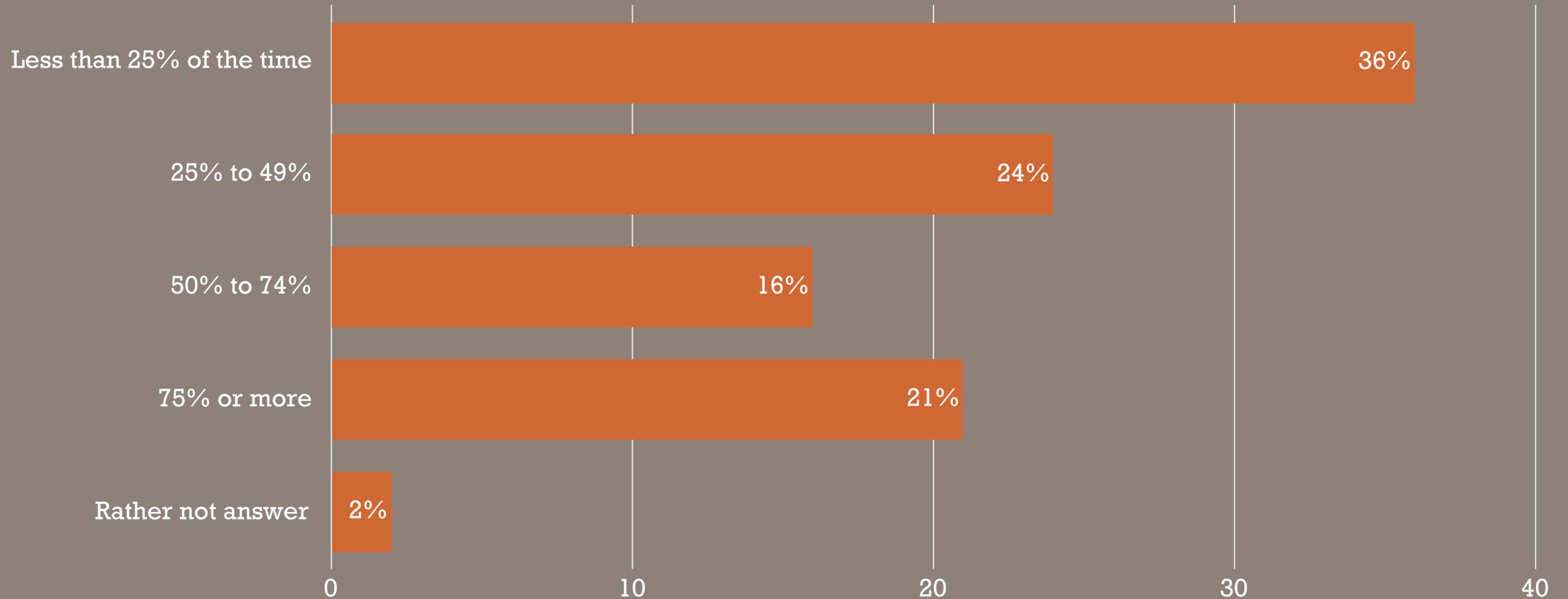


Services regularly provided





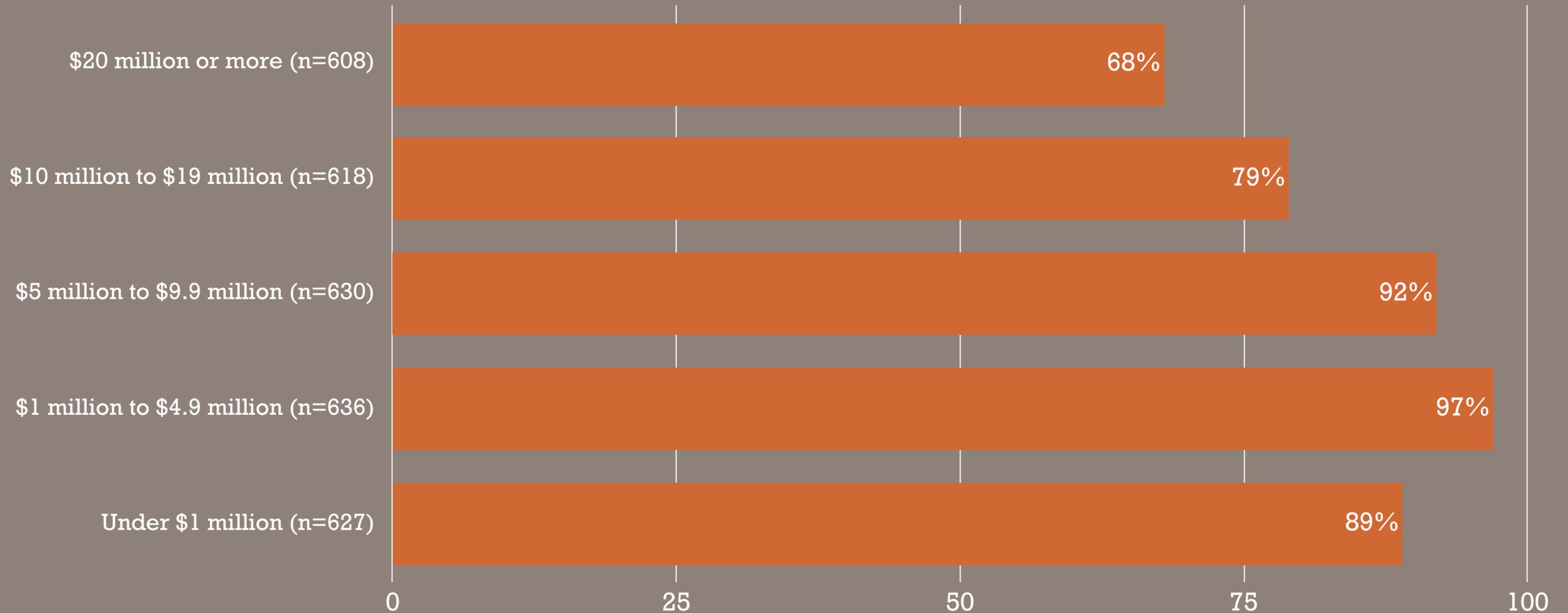
Amount of practice involving wills, trusts and powers of attorney





Clients span a broad range of wealth

For each of the following categories of net worth, please indicate if you have clients at that level.





96%

Experience with
planned giving is
nearly universal.



Knowledgeable, but not an “expert”



With one exception, at least 80% are reasonably knowledgeable about each PG mechanism. But, with one exception, no more than 20% consider themselves experts.

Naming NP as beneficiary of life insurance policy

Charitable remainder trust (CRT)

Charitable bequest of residue through will

Naming NP as beneficiary of retirement account

Charitable bequest: personal property through will

Donor-advised fund

An IRA charitable rollover

Charitable lead trust (CLT)

Gift from private foundation

Charitable gift annuity (CGA)

Retained life estate

Charitable bargain sale



**What are
valuable sources
for technical
information?**

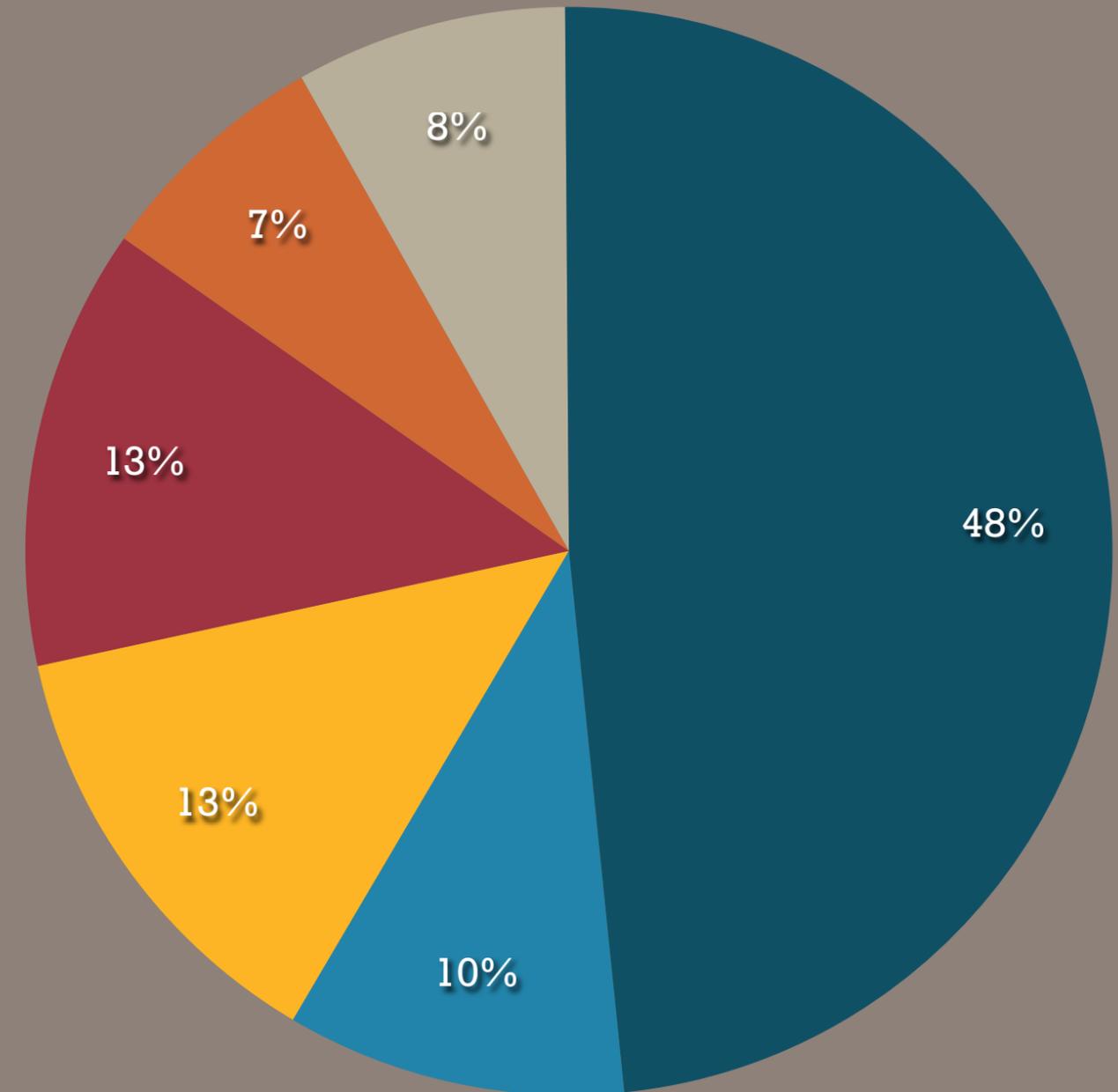


Most often cited
Professional
colleagues



Advisors are planned givers, too.

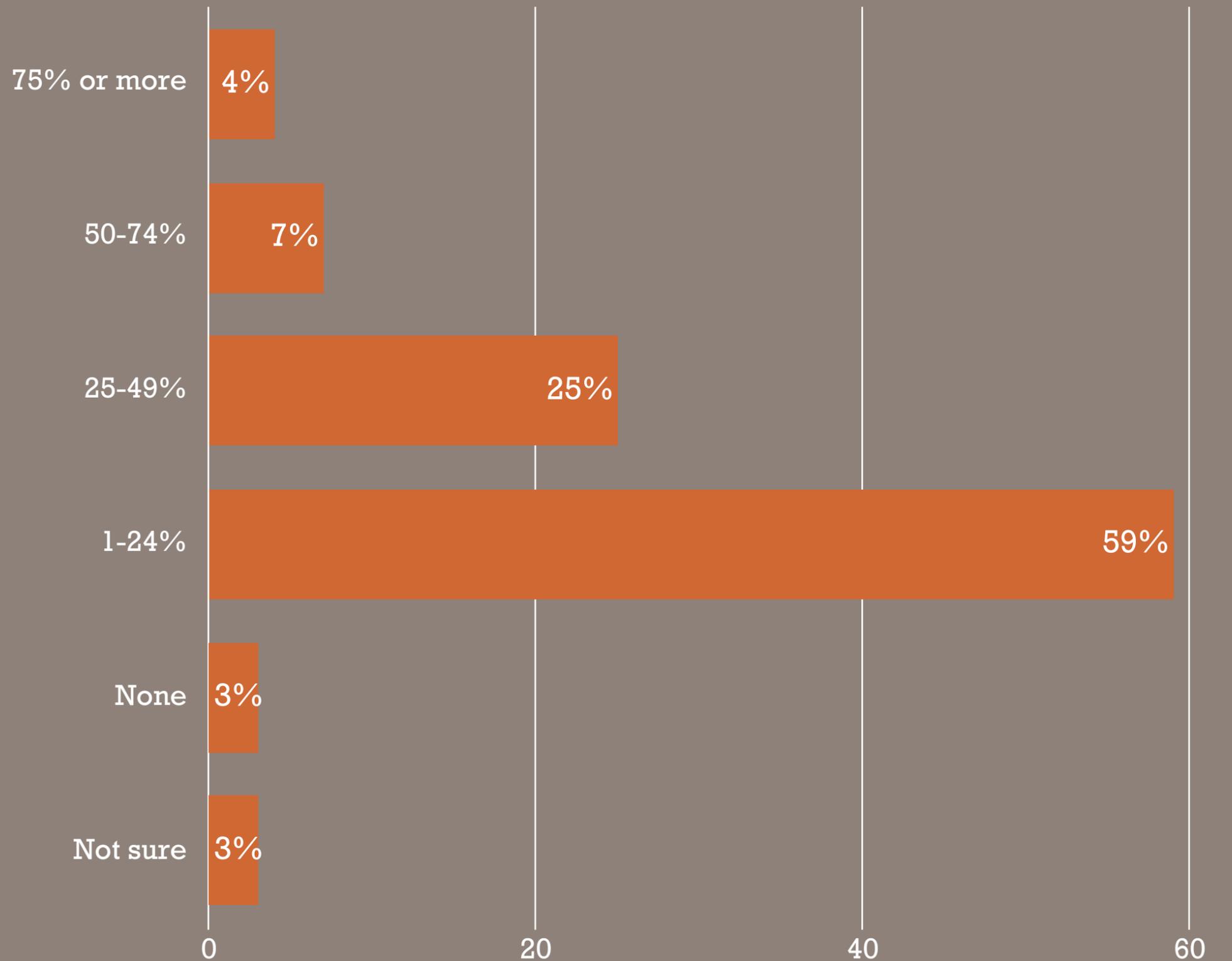
- Already have a planned gift in place
- Will definitely do so at some point
- Will probably do so at some point
- Might or might not make a planned gift
- Probably will not make a planned gift
- Not sure/rather not answer





Planned giving is not common

WHAT PERCENTAGE OF YOUR CLIENTS INCLUDE A NONPROFIT IN THEIR ESTATE PLAN?





Profile of the High Producers



VETERAN ESTATE
PLANNERS



EMPHASIZE ESTATE
PLANNING



BROAD RANGE OF
GIVING EXPERIENCE



SERVE HIGH-VALUE
GIFT CLIENTS



CERTIFIED FINANCIAL
PLANNER



PLANNED
GIVERS

CHAPTER TWO

Conversations With Clients





“Is it appropriate
to mention
**planned
giving?**”

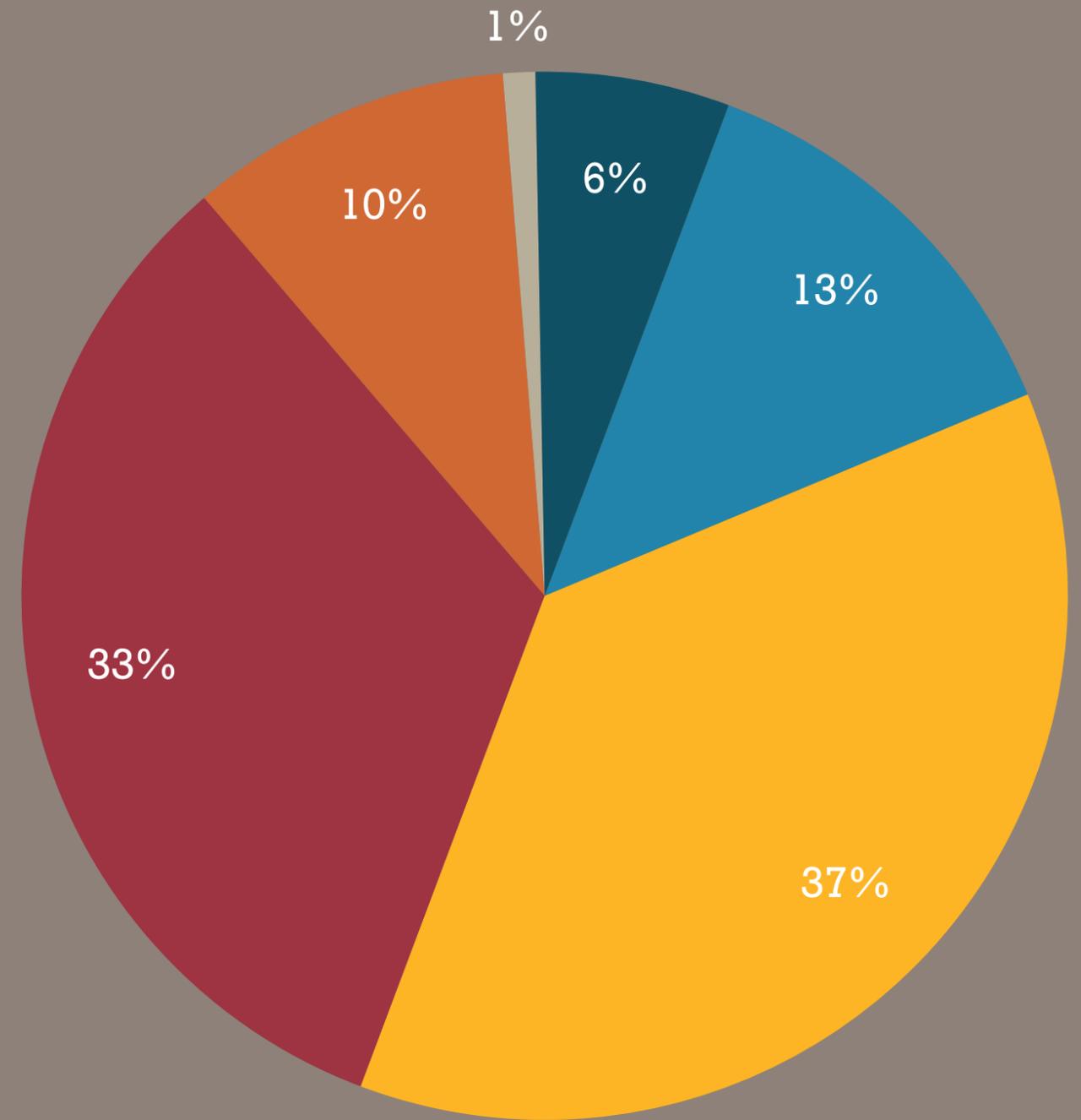


YES!



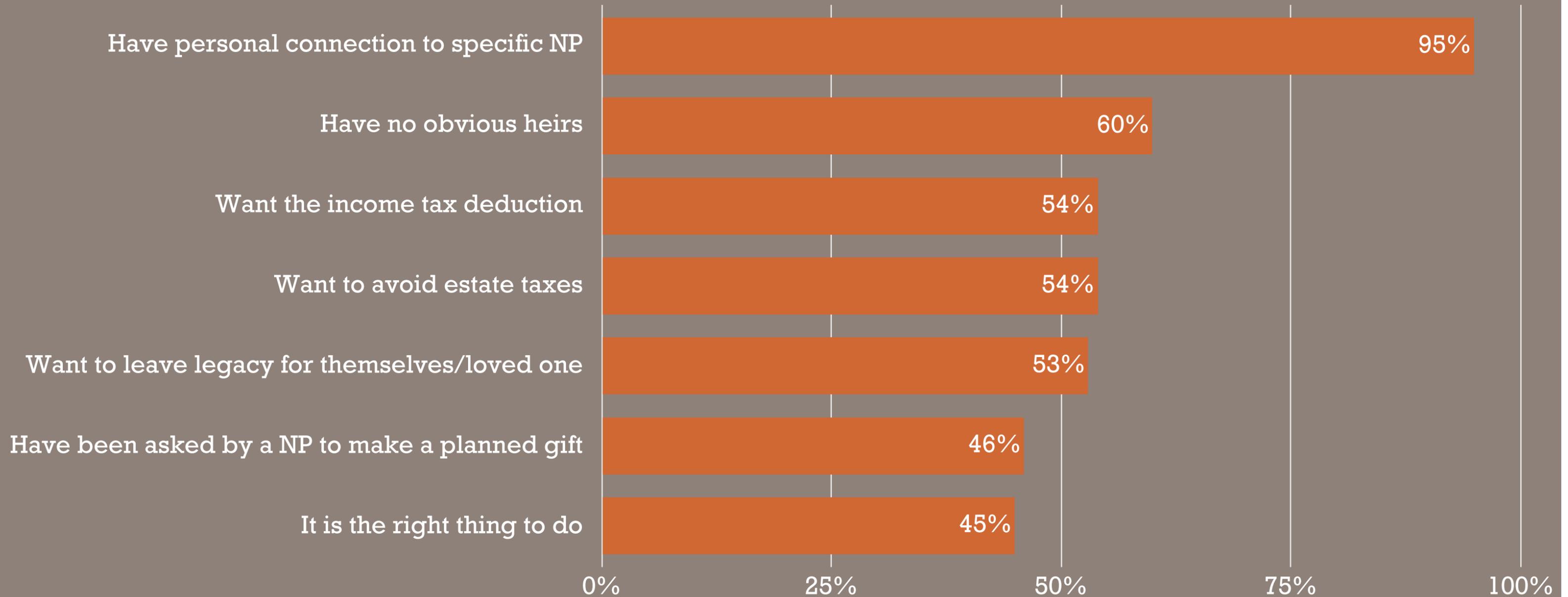
Advisors typically introduce the topic.

- Almost always the client
- Mostly the client
- About half and half
- Mostly me
- Almost always me
- Never had such a conversation with a client



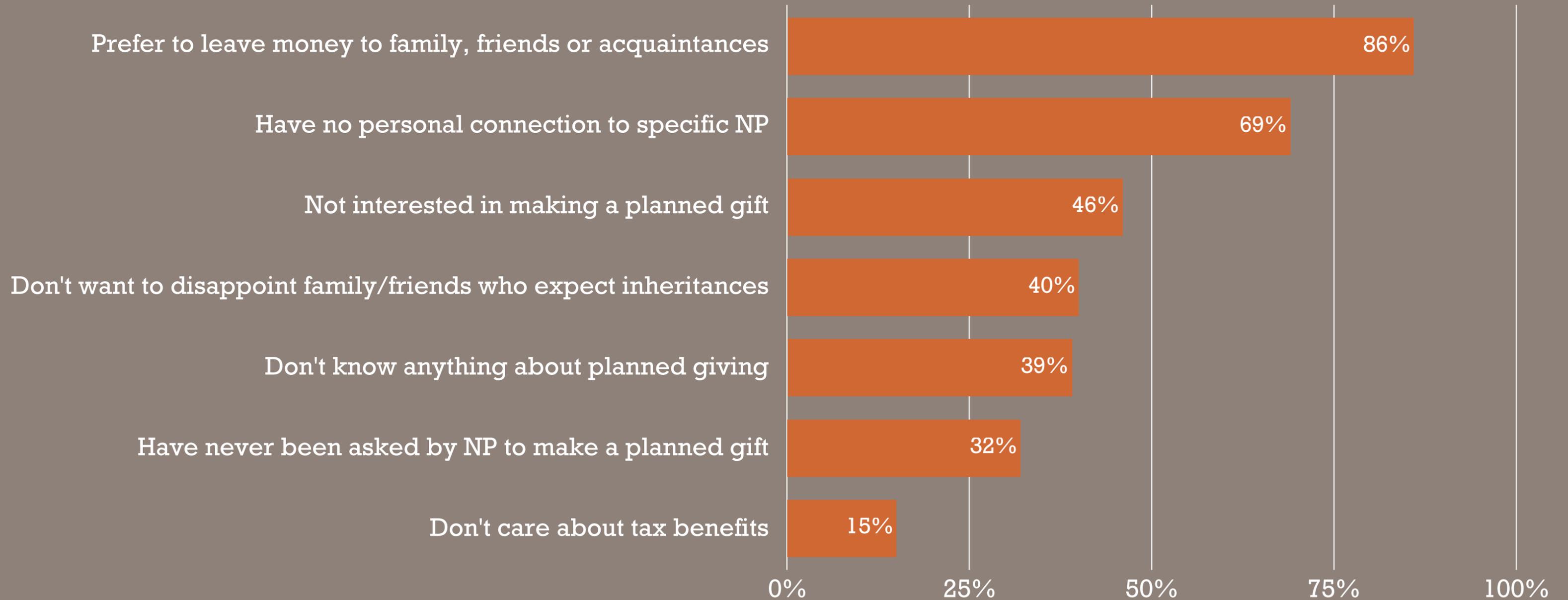


Major reasons clients decide to make a planned gift





Major reasons clients decide NOT to make a planned gift



CHAPTER THREE

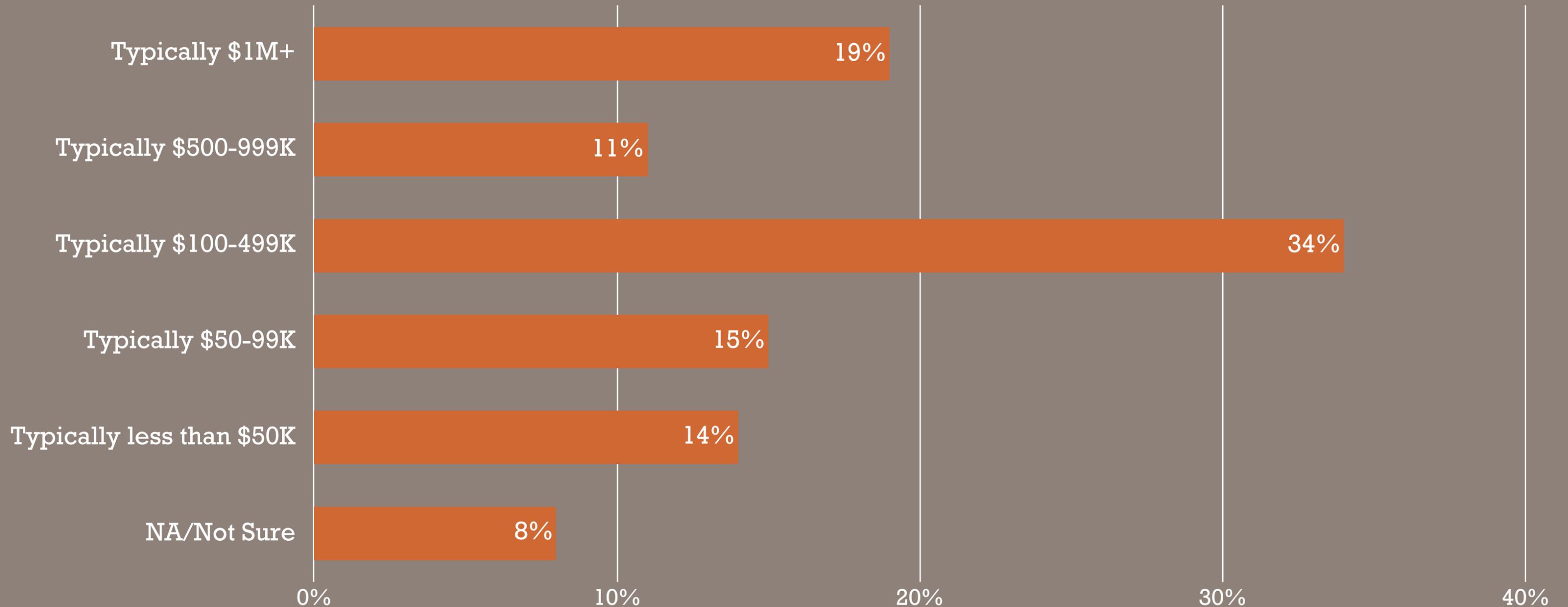
Planned Gifts In Practice





Gifts come in all sizes

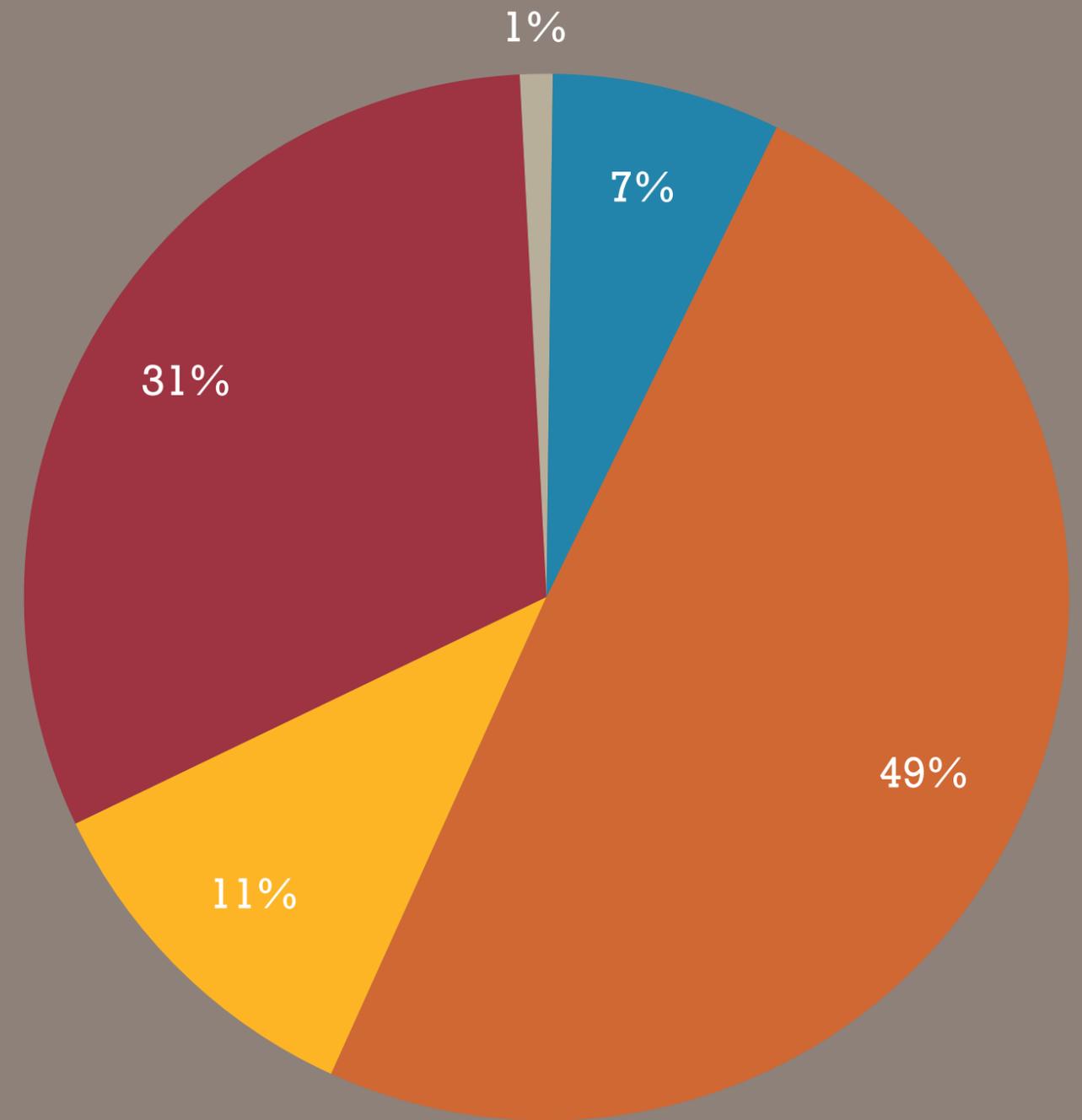
What is the average total dollar value of planned gifts in estates you've worked on?





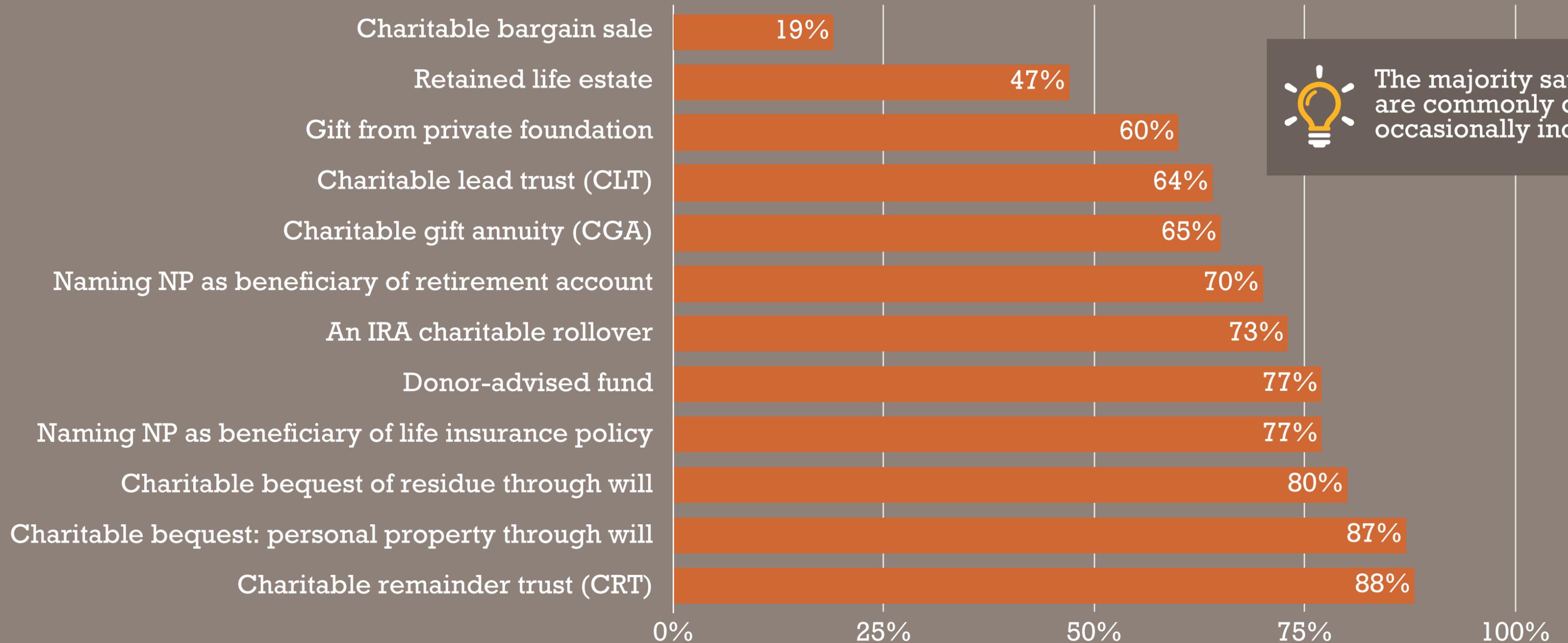
Interest spans all levels of wealth

- Only very wealthy
- Mostly very wealthy
- Mostly middle-class
- All levels of wealth
- Not sure





How commonly are each of these a part of your clients' estate plans?

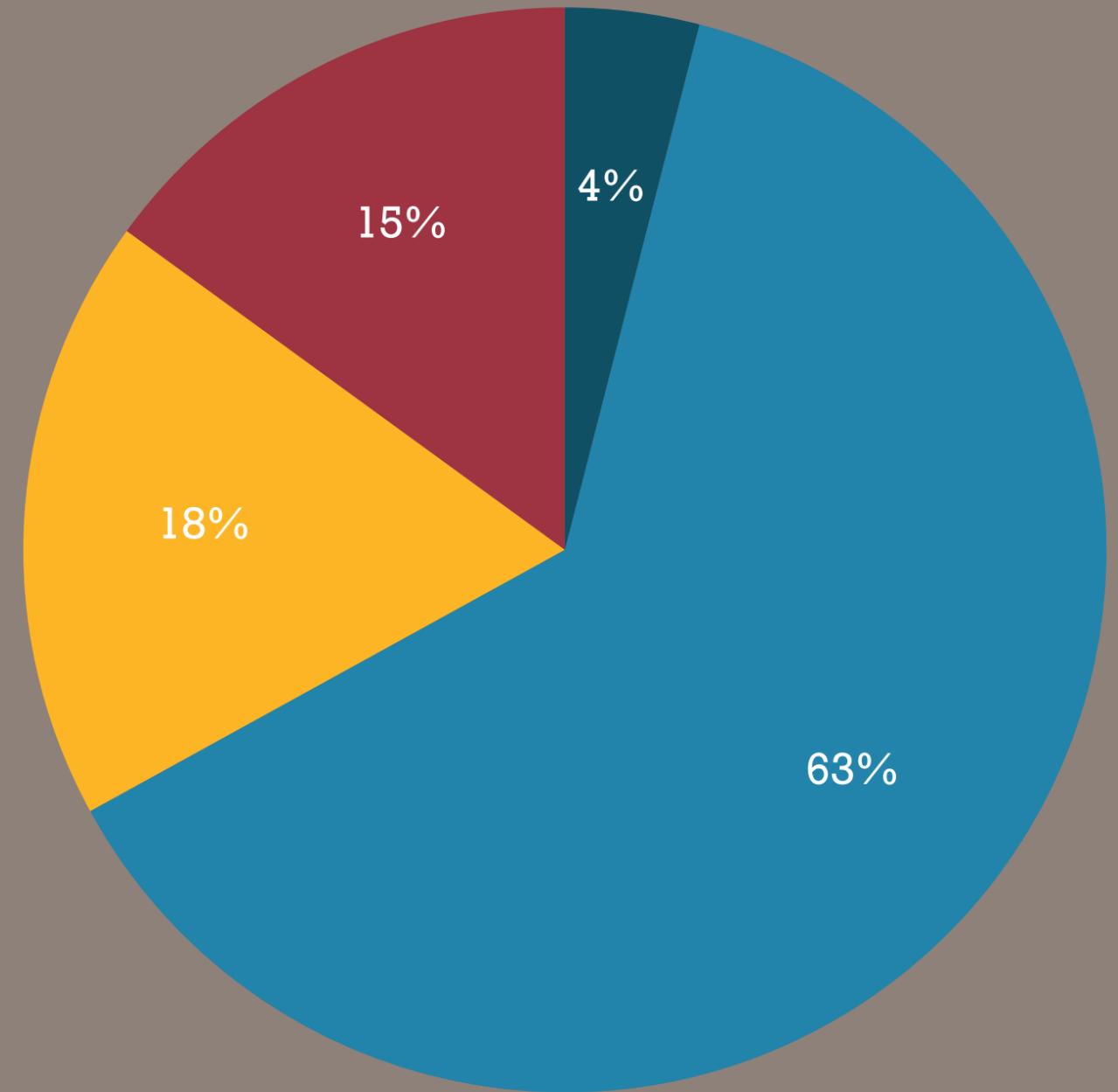


The majority say these are commonly or occasionally included



Removing nonprofits from estate plans is not common.

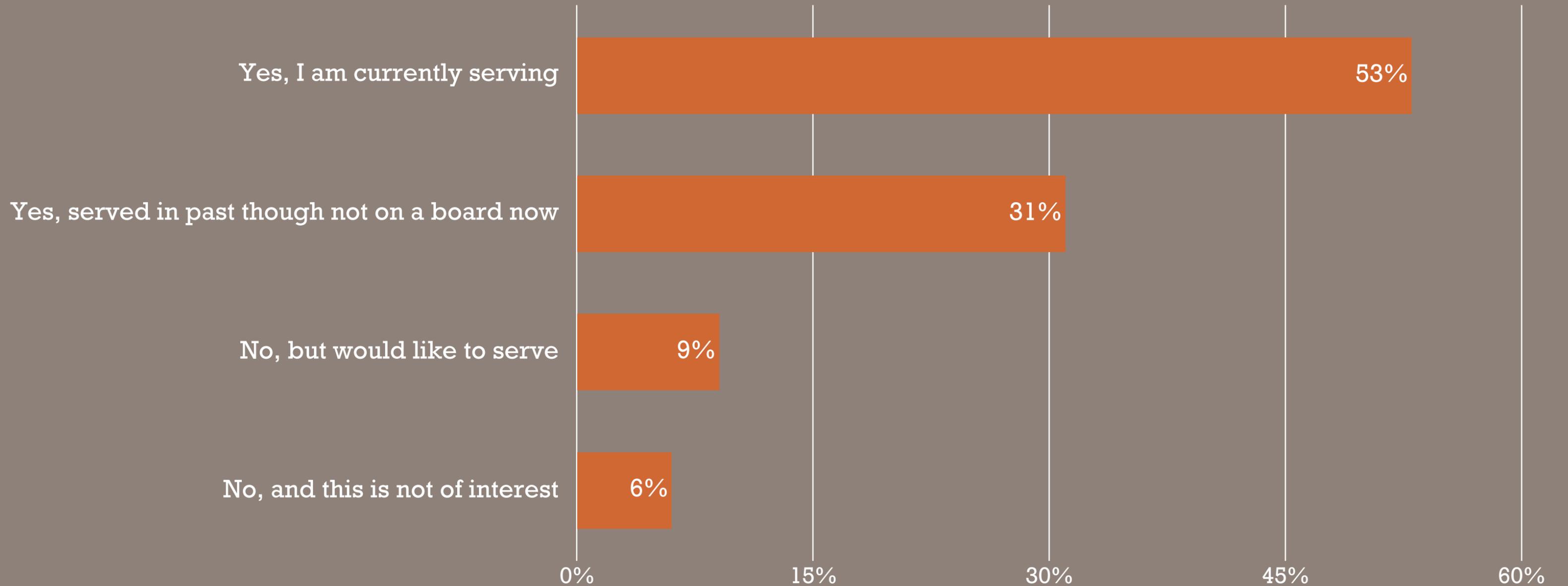
- Common
- Occasional
- Never
- Not Sure





Nonprofit board involvement is common

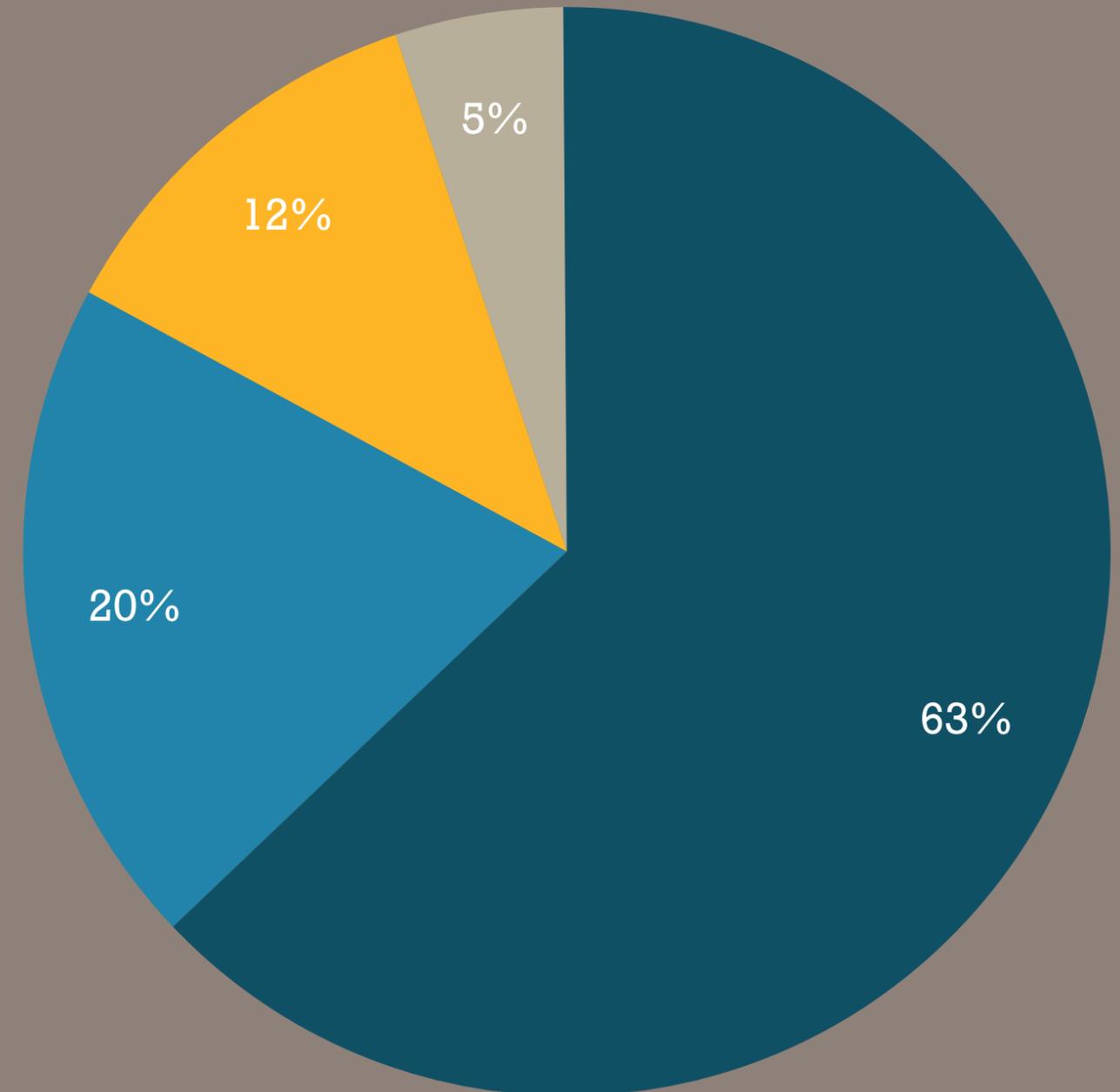
Do you now or have you ever served on the board of a nonprofit organization?





Relationships with nonprofits matter

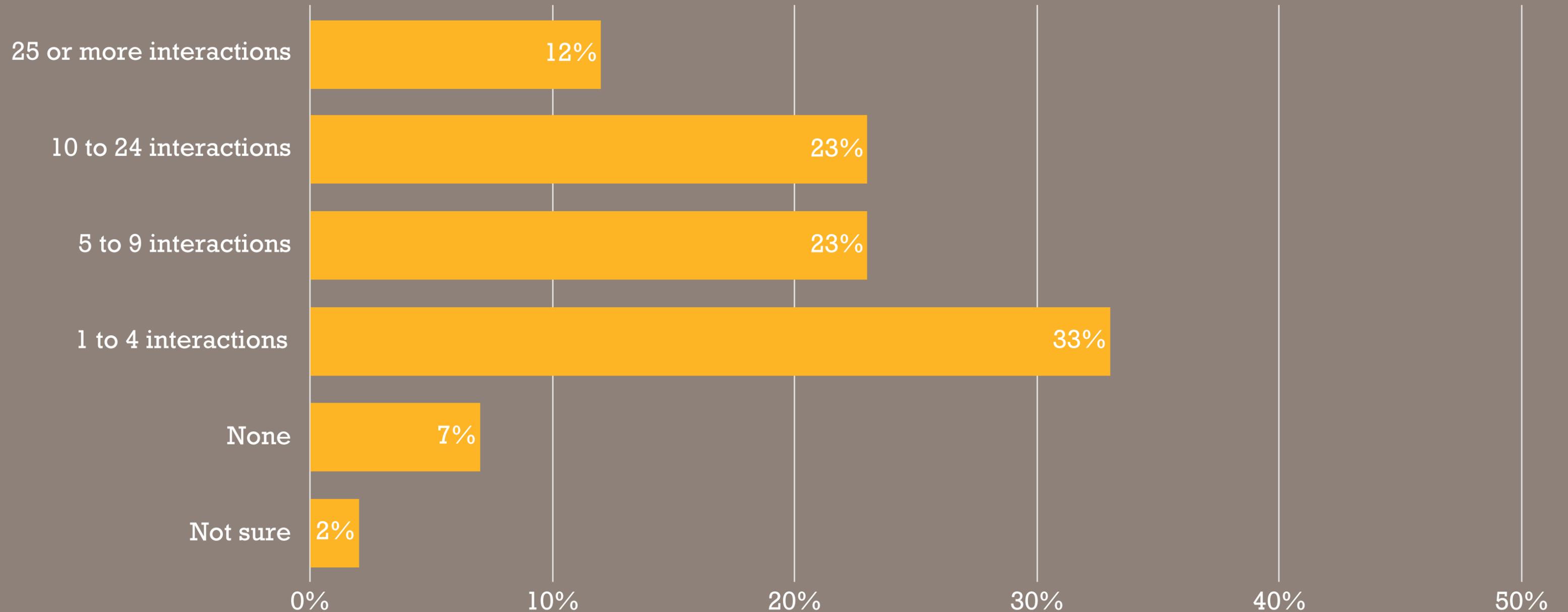
- Already have relationships and consider them valuable
- Don't have these relationships now but would consider them valuable
- No, don't think this would be a benefit to me
- Not sure





Exposure to PG professionals is low

In the past year, about how many professional interactions have you had with a planned giving professional working for a nonprofit?

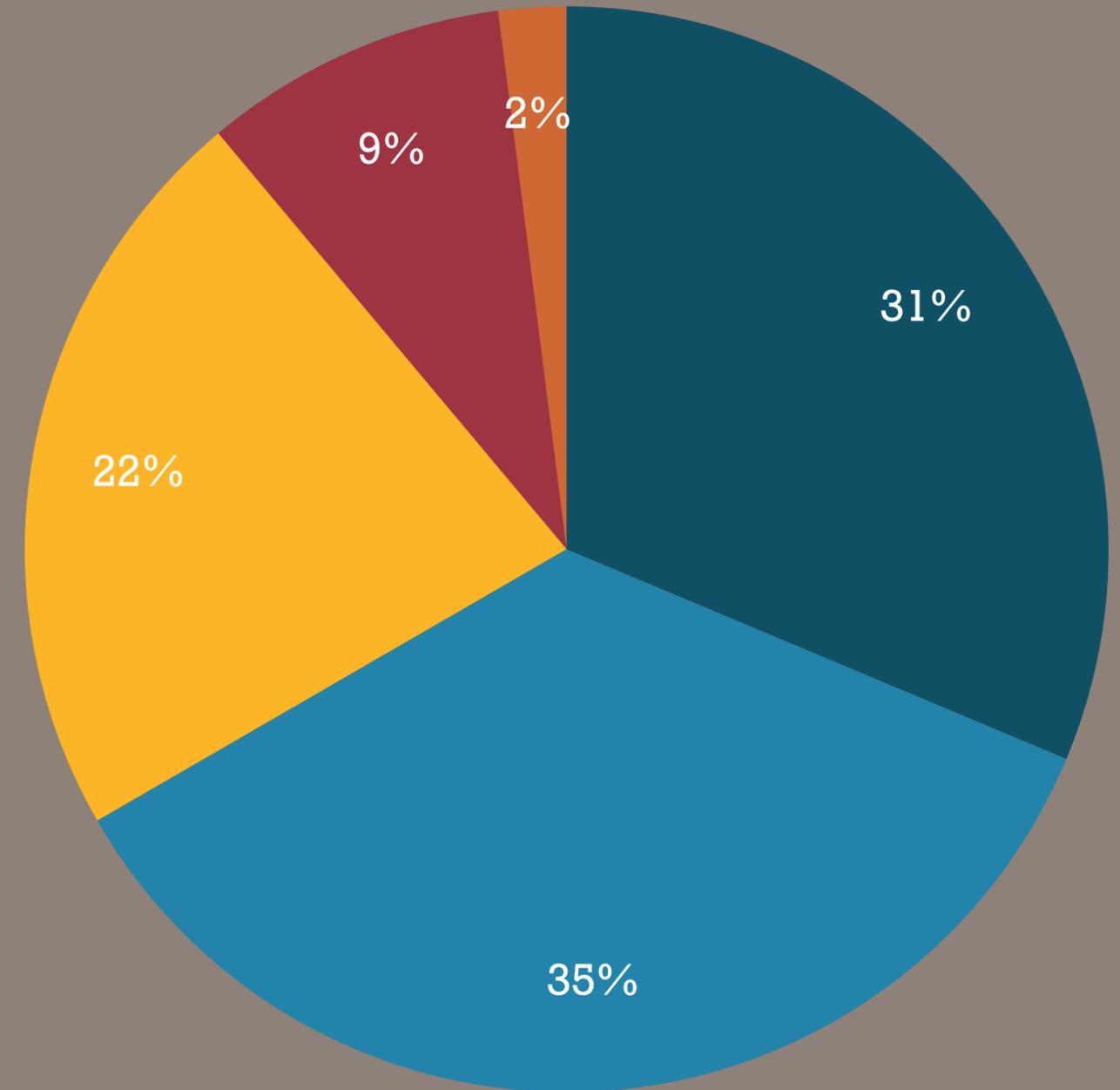




Collaboration is welcome

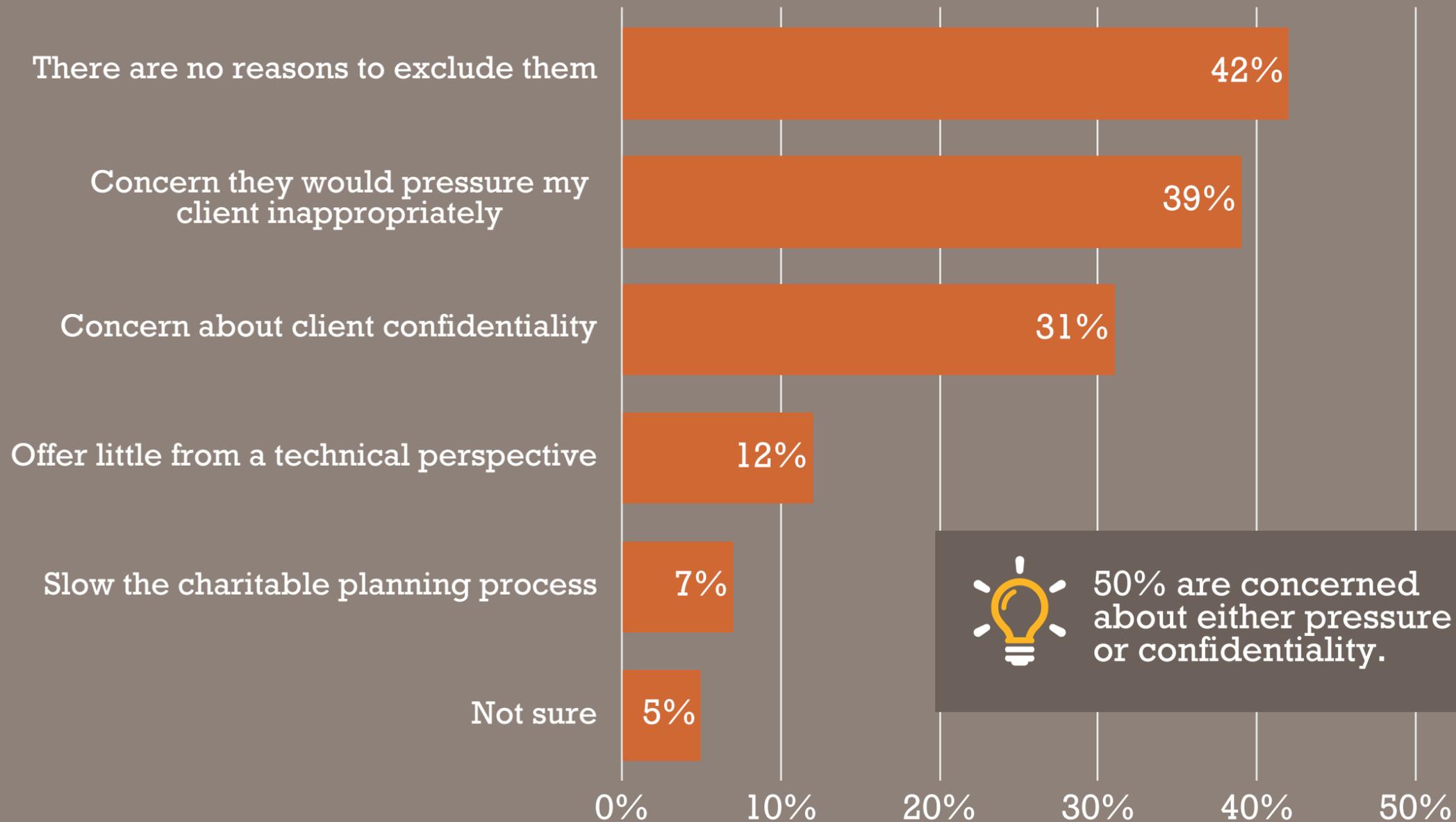
In general, how interested would you be in collaborating with planned giving professionals working for nonprofits on ways to increase estate planning and planned giving?

- Very interested
- Fairly interested
- Just somewhat interested
- Not interested
- Not sure





Why planned giving professionals are excluded



When a client has expressed an interest in making a planned gift, what would be the main reasons you would choose to exclude planned giving professionals working for nonprofits from the planning process?



Ways to collaborate

Showing the client you are willing to work as a team to formalize the planned gift

53%

35%

9%

3%

Raising awareness of estate planning

51%

38%

9%

2%

0%

25%

50%

75%

100%

Very valuable

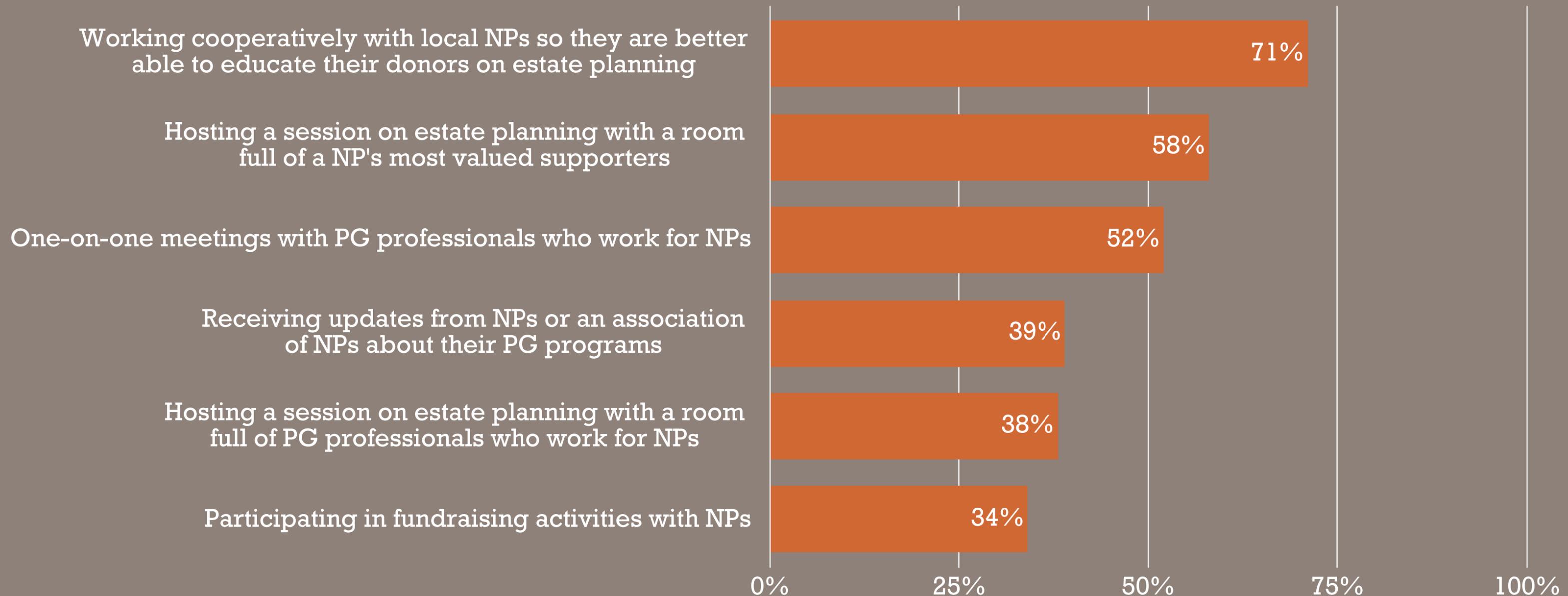
Somewhat valuable

Not that valuable

Not Sure



Activities perceived to provide a business advantage





Recommendations



Recommendations

Build relationships with advisors who meet
the high-producer profile.



Recommendations

Be more of a philanthropic expert than
a technical one.



Recommendations

Consider counting revocable planned gifts
toward campaign goals.



Recommendations

Establish board-approved policies respecting
anonymity and donor confidentiality.



Recommendations

Connect with supporters at all
levels of wealth.



Recommendations

Connect with supporters of all ages.



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Q&A



Follow-Up

On Monday, please visit us at www.stelter.com/webinars.html
to access the recording and handouts.



Continue the Conversation

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Thank You!