

Understanding the Major Trends that are Impacting Donors Today... and Tomorrow!

How shifts in donor behavior are impacting nonprofit outreach



Nathan Stelter

President

The Stelter Company

- Planned giving professional for over 18 years
- Primary concentrations include overseeing Stelter's consulting and marketing teams
- Drives company research, innovations and helps find smarter ways for charities to raise planned gifts
- Has spoken at over 100 national and regional industry meetings on gift planning marketing trends and cutting-edge donor and fundraising research
- Quoted in Planned Giving Today, Advancing Philanthropy and other trade publications
- Authors the highly successful Stelter Insights blog
- Serves on the board for the National Association of Charitable Gift Planners
- Past board member of the National Capital Gift Planning Council (Washington, DC) and a current member of the Mid-Iowa Planned Giving Council

The **HARD TRUTHS** of Planned Giving

2/3 of “realized” planned gifts are unknown at time of receipt

Planned giving decisions are based on a donor’s timeline, not ours!

Donor’s decisions are 57% completed **BEFORE** ever reaching out to you

1

**Why Are We Seeing
This Change?**

2

**Understanding
Today's Donor**

3

**What Does This
Mean For You?**

1

Why Are We Seeing This Change?

IMPACT OF SHIFT IN
Demographics

.....

Demographic Shift

- PG largely grown on back of the Great & Silent Generations
- Boomers think differently, act differently



Matures (Born 1925-1945)

Matures Values:

- » Hard work
- » Fiscally conservative
- » Respect for authority and formal rules
- » High value for education
- » Value on the 'greater good' over themselves
- » Trust in charity



Boomers (Born 1946-1964)

Boomers' values:

- » Optimism
- » Work ethic
- » Challenge the status quo:
- » “Never trust anyone over 30”
- » Explosion of Television and broader ‘access’ to information
- » Personal gratification (The “Me” Generation)



Why Boomers?

- » Comprise 39% of US adult population
- » Control 80% of the wealth in the US
- » Give 50% of individual philanthropic giving
- » Are one-third more generous than Matures at the same age
- » Will maintain wealth inequity for the next 20 years (don't retire at 65)

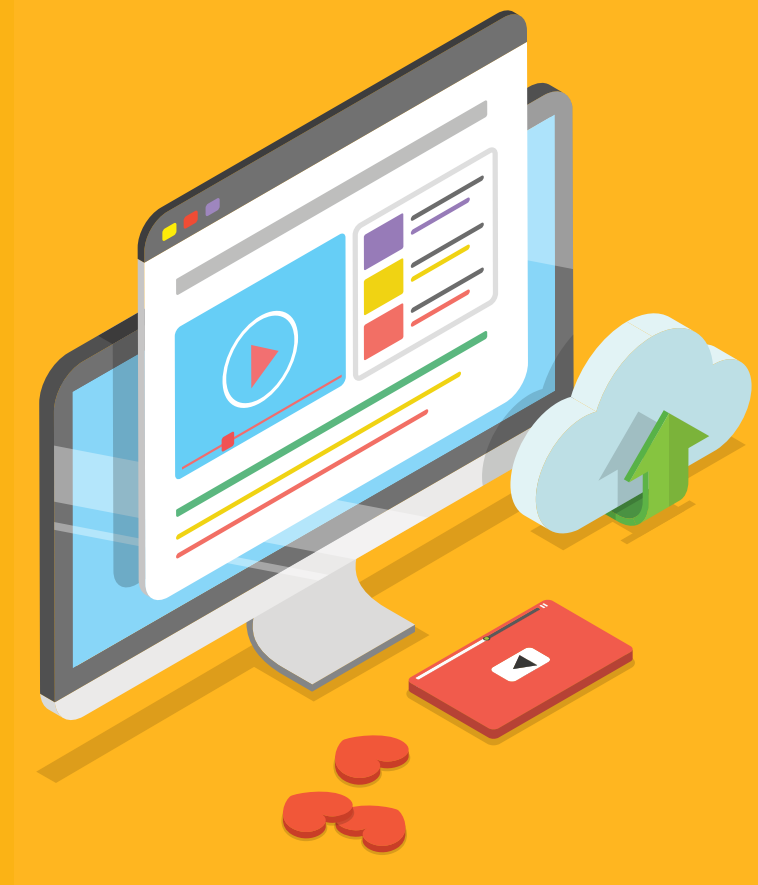


Generational Similarities

- » Attach the same importance to donating to charity
- » Both volunteer with nonprofits at the same rate
- » No significant difference in percentage by generation of those who have left a gift to a nonprofit in their will
- » Both concerned about outliving their wealth

Financial Concerns Plague Boomers

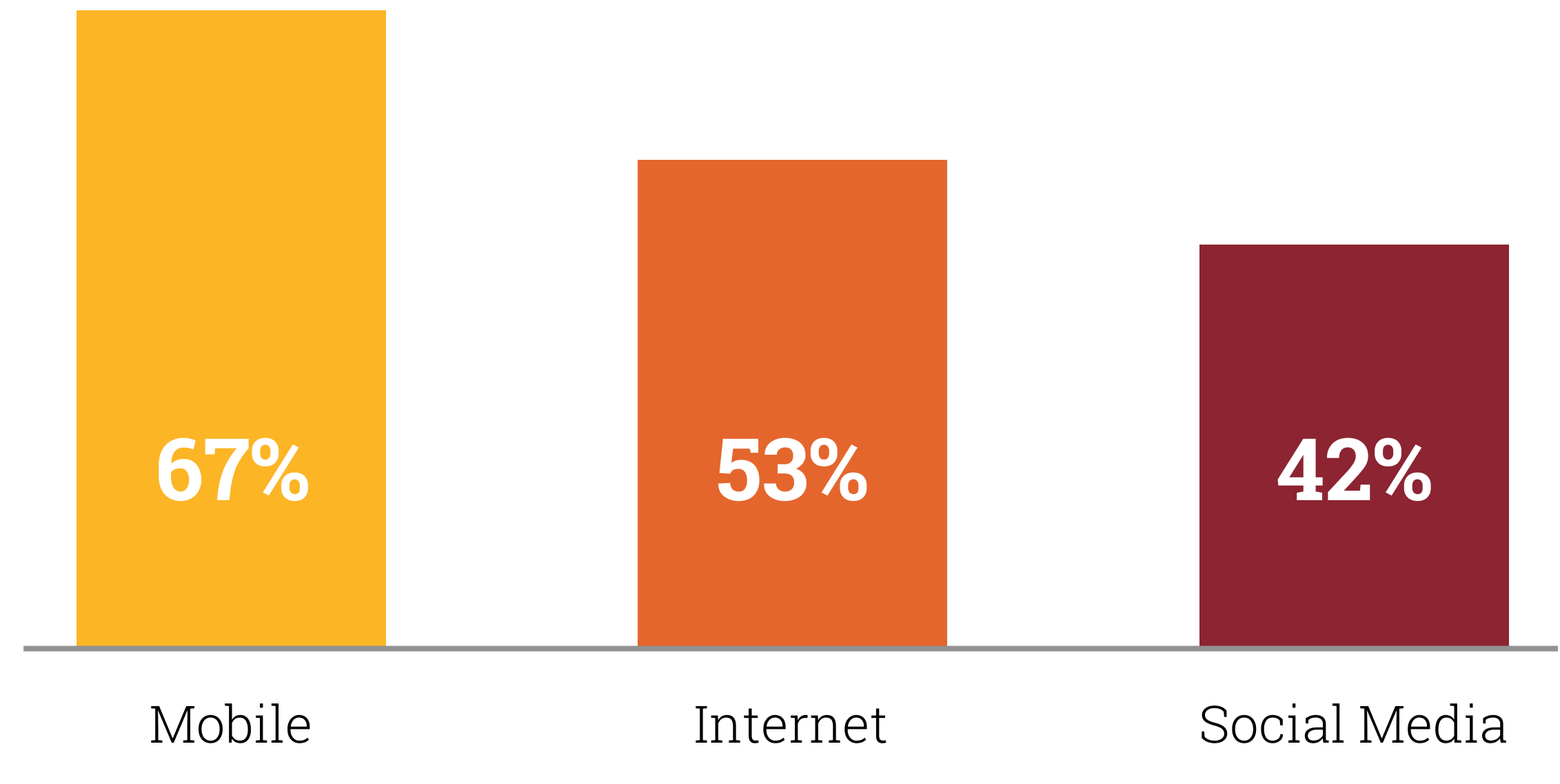
- » Boomers are first 'sandwich generation'
- » Less than half of Boomers believe they will have enough money to meet their financial obligations after retirement
- » Both Matures & Boomers fear outliving their savings – But for very different reasons



IMPACT OF TECHNOLOGY

The Digital Landscape

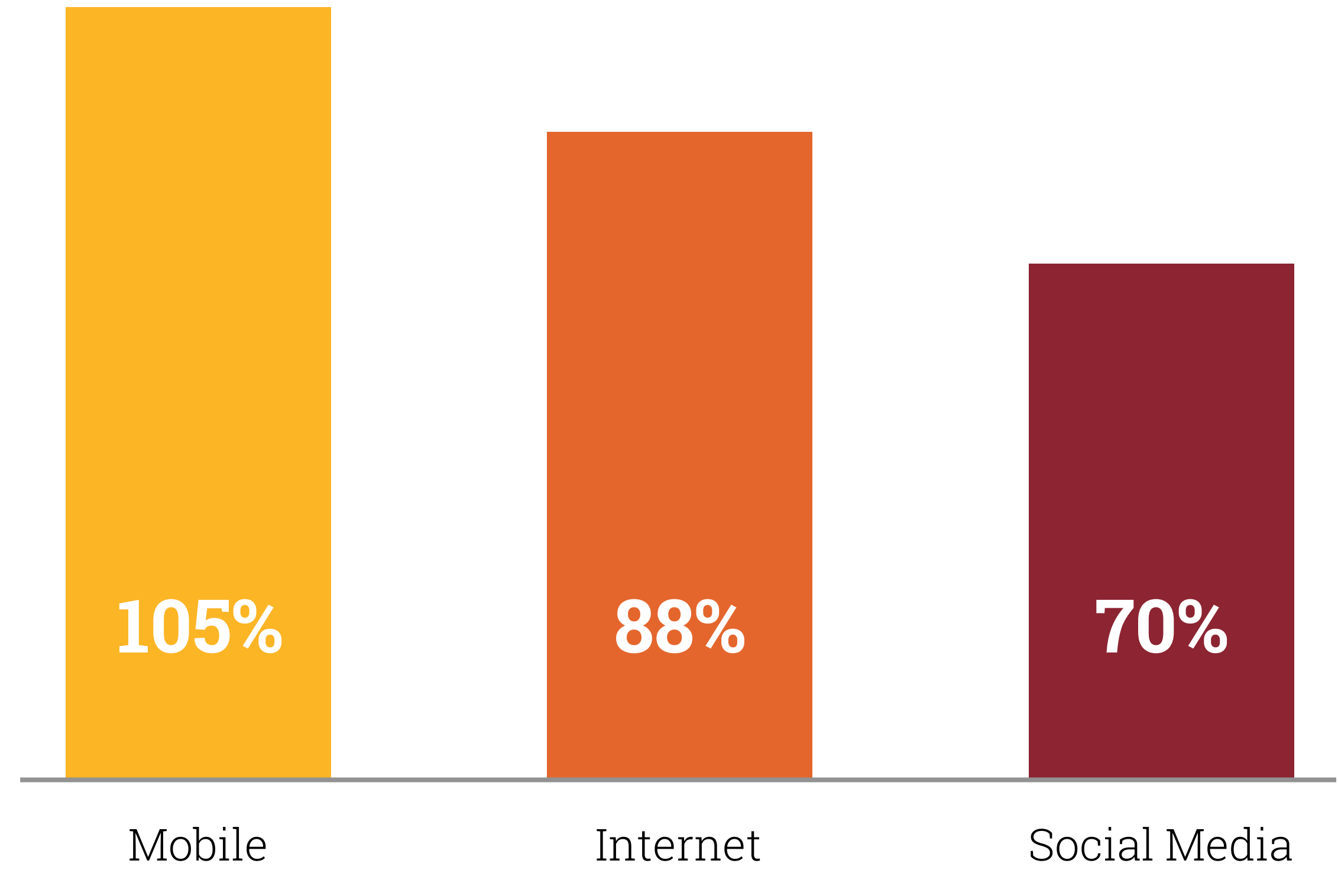
2018 Digital Use Worldwide



Takeaway:
The world is online

Total Population = 7.6 billion
Mobile users = 5.1 billion / **+4%**
Internet users = 4.0 billion / **+7%**
Social Media users = 3.2 billion / **+13%**

2018 Digital Use In The U.S.



Takeaway:

The U.S. is a mobile country

Total US Population = 326 million

Mobile subscriptions = 341 million

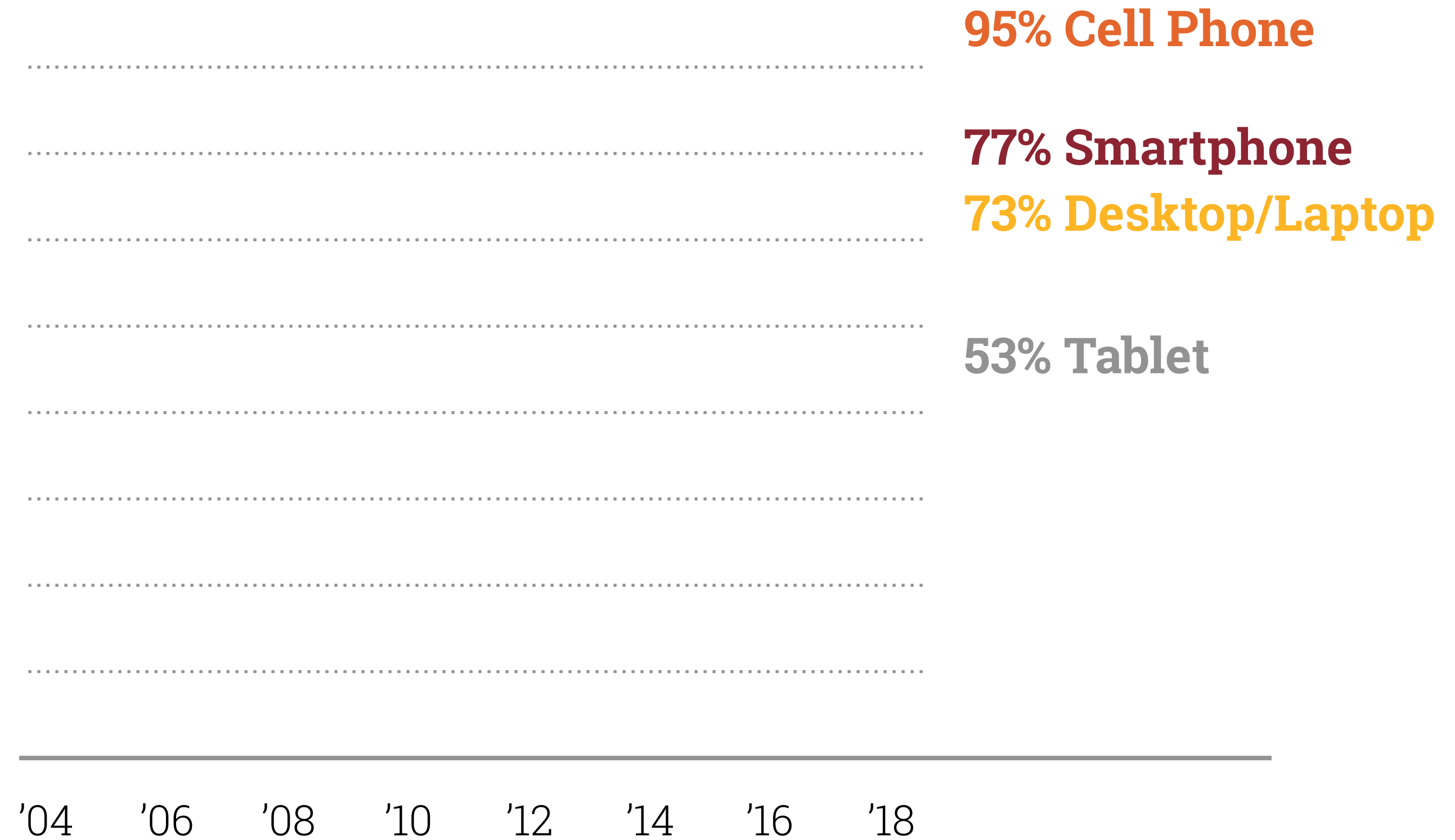
Internet users = 287 million

Social Media users = 230 million

Digital Technologies

Takeaway:

Look at the split of mobile vs. desktop usage, this is why we build mobile first.

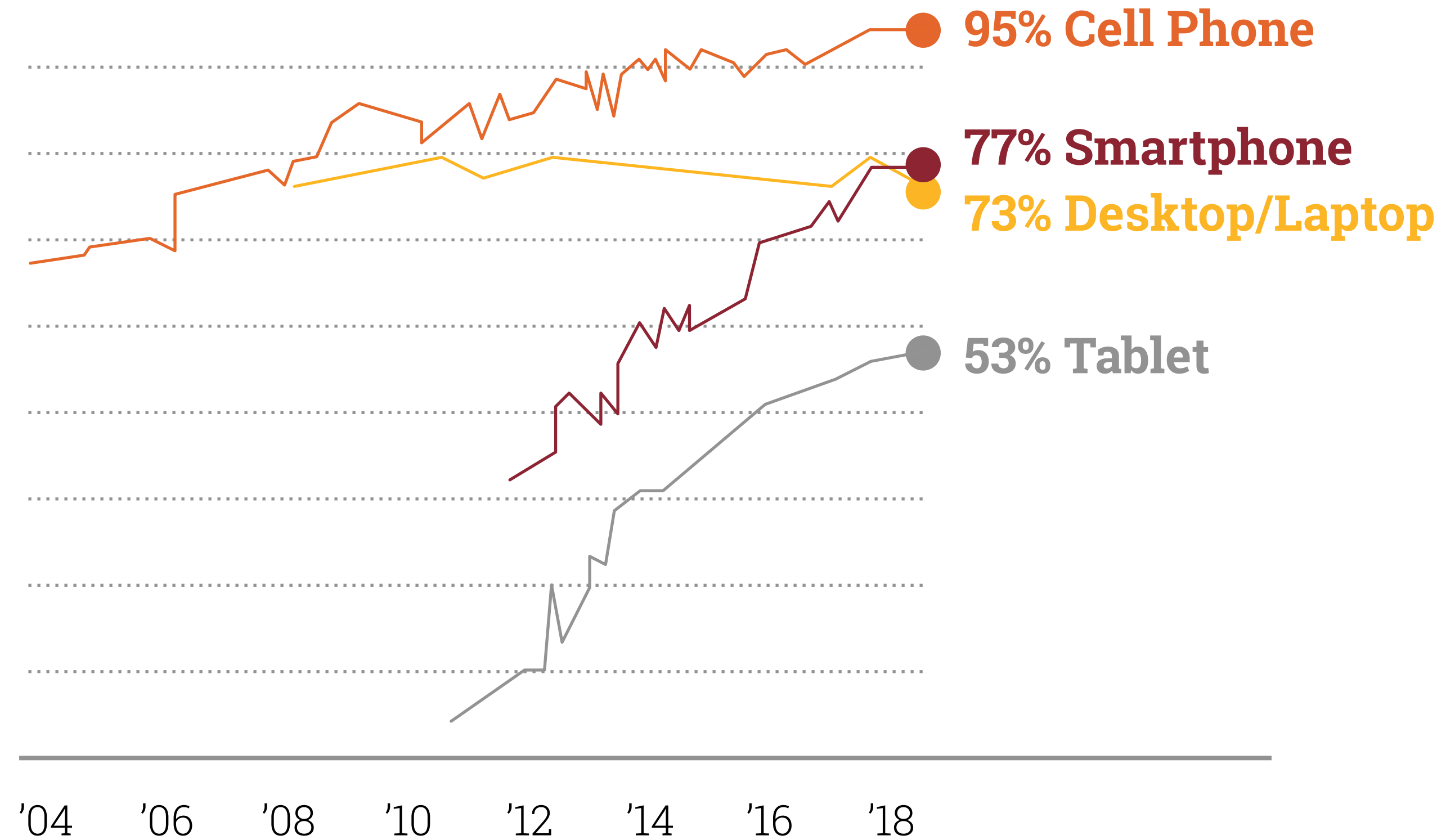


% of U.S. adults who say they own or use each technology

Digital Technologies

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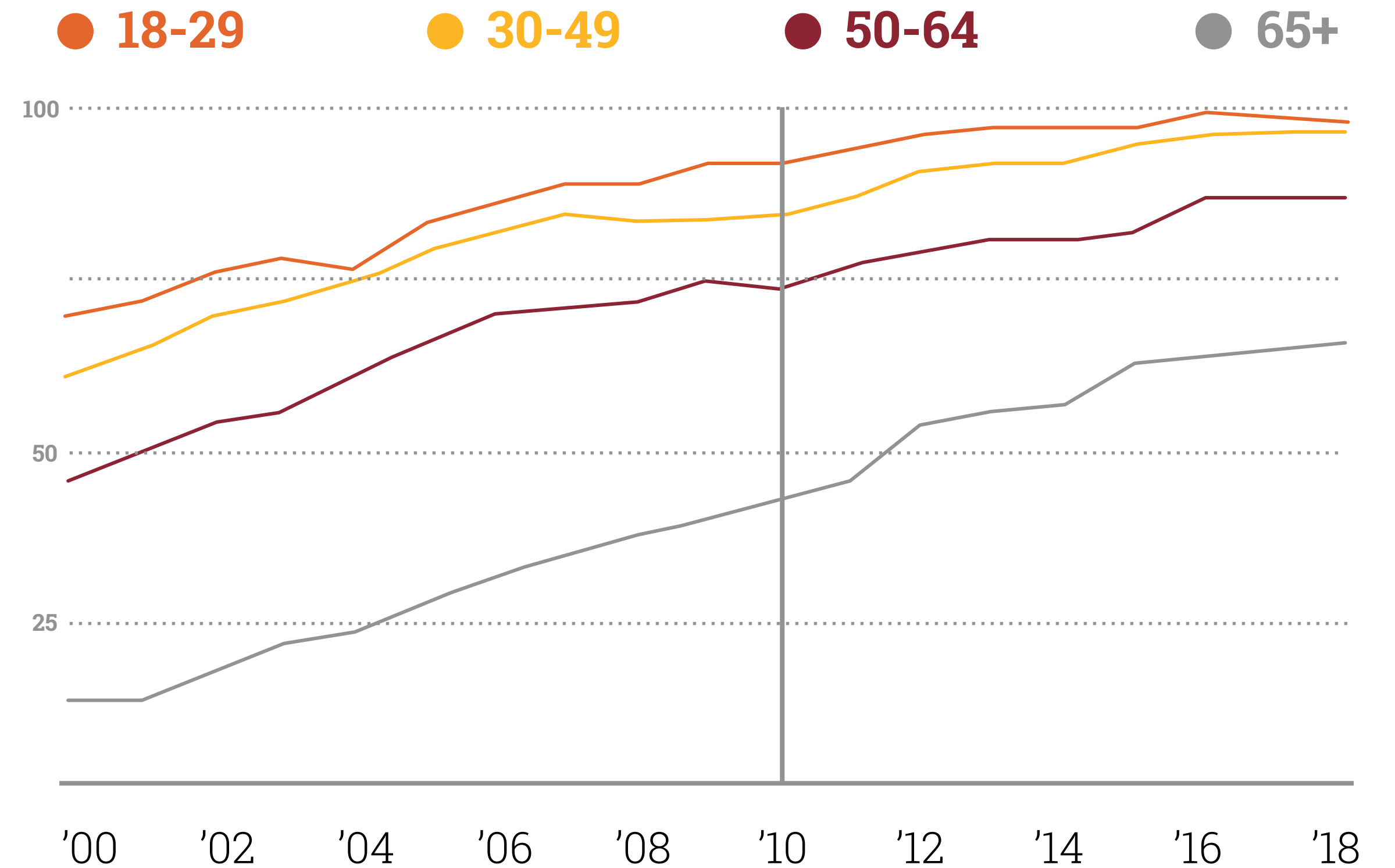


% of U.S. adults who say they own or use each technology

Internet Usage in U.S.

Takeaway:

65+ is later to the game, but joining very fast.



% of U.S. adults who say they own or use each technology

How Often Do You Use the Internet?

Takeaway:

Being online is no longer a planned activity. It is a part of their daily life.

	18-29	30-49	50-64	65+
Almost constantly	40	38	20	11
Several times a day	50	48	49	45
Once a day	4	5	13	17
Several time a week	3	6	8	12
Less often	3	3	10	15

% of U.S. adults who use the internet, by age

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%

“Use the Internet to Research Charities that I am Considering Giving a Gift”

.....
General Population / 42%



Millennials

51%



Gen X

45%



Boomers

35%



Matures

27%



Who “Holds the Keys” Now?

1/3 of Matures and Boomers are using the internet to research charities they are considering giving a gift

More than one-half of frequent donors, and wealthier donors are using the internet to research charities they are considering giving a gift

IMPACT OF CHANGE WITH

Society's View of NPO's

.....

Society's View on NPO's

- Giving More to Fewer
- “Giving” vs “Investment”
- Dwindling Patience
- Trust

Giving More to Fewer



Planned Giving Considerations: Q: If you were to consider leaving a gift to a charity in your will, which of the following would you be likely to do?



Millennials

20% 100% to One Org.
54% Split Gifts
26% Would Not Give



Gen X

15% 100% to One Org.
47% Split Gifts
38% Would Not Give



Boomers

13% 100% to One Org.
39% Split Gifts
48% Would Not Give



Matures

13% 100% to One Org.
33% Split Gifts
54% Would Not Give

Gift Intention: Q: Of those who would split gifts, if you were to sign a will in the next 6 months, how many charitable organizations would you be likely to include?



Millennials

20% One
42% Two
29% Three
9% >Three



Gen X

19% One
45% Two
27% Three
9% >Three



Boomers

19% One
39% Two
30% Three
12% >Three



Matures

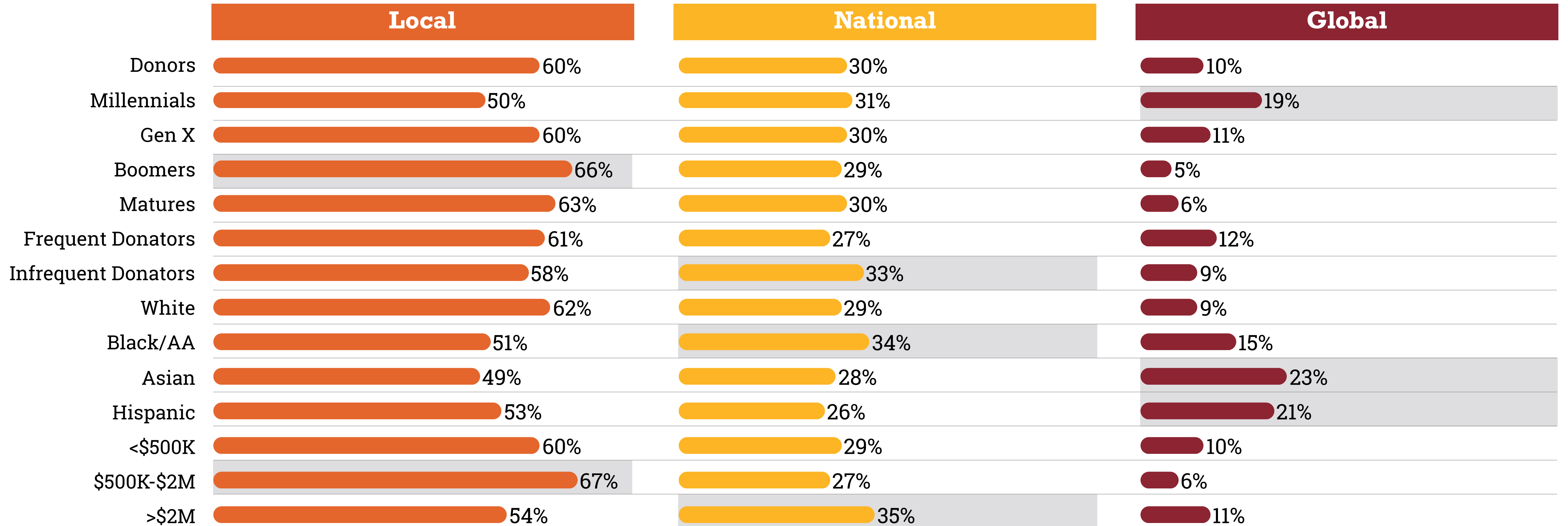
4% One
51% Two
32% Three
13% >Three

Views on Impact of Gifts

- Nearly 7 out of 10 donors prefer to give to local organizations over national or global nonprofits
- Want their gift to make a meaningful impact on a personal level

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,

A handwritten signature in black ink that reads "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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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.

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Fax 740-286-6686
seohiofoodbank.org



35,000

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food to eat.



3 million

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**17,000 OF THOSE
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Sincerely,

Mary Anderson

Mary Anderson
Planned Giving Officer

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Feed the Next Generation in Jackson County

Dear Eric,

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 Jackson County who are struggling.

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Sincerely,

Mary Anderson

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



AmeriCares

HAVE A GREATER IMPACT Today and Tomorrow

AmeriCares Changes Lives of Children in Africa

Africa is home to more than 34 million children. This is a snapshot of some of the assistance provided in recent years.

5,000

Course treatments of nutritional supplements to orphaned and vulnerable children



180

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

7 million

Units of medicine delivered to children in need

Fall 2015

88 Hamilton Avenue
Stamford, CT 06902

203.658.9500
americares.org



Mr. and Mrs. Joseph Levy
Clifton Knls
12 Birchwood Dr
Clifton Park NY 12065-4815

Dear Mr. and Mrs. Levy,

Let me begin with a heartfelt thank you. It's because of the generosity of people like you that AmeriCares is able to help save lives and improve the health of people in need every day.

Health is the foundation of everything.

Whether you live along the Bagto River in the Philippines or in <<CITY, STATE>>, good health is essential for strong, resilient communities. This is why AmeriCares is committed to delivering critical aid and medicine to people affected by poverty or disaster.

Many people do not realize that AmeriCares is the largest provider of medical aid in the United States. Last year our health partners provided patients across all 50 U.S. states and Puerto Rico with critical medicine, vaccines and supplies. Our latest newsletter highlights AmeriCares important work to serve the uninsured and underinsured in <<STATE>> and throughout the United States.

In addition, look inside for a special story from a recent medical trip that AmeriCares supported in the Philippines. During this trip, a team of volunteers cared for more than 3,000 people, including a 12-year-old boy who was able to walk for the first time because of the surgery he received.

You can help change the lives of people affected by poverty or disaster so that they can reach their full potential. Look inside to learn about a meaningful way to support our programs and honor an important person in your life.

If you are interested in the various ways you can extend your impact with a gift of health, please contact us. We would love to help you on your journey.

With gratitude,

Michael J. Nyenhuis
President and CEO

P.S. After reading the enclosed newsletter, return the enclosed reply card to request our helpful planning resource [How do you want to be remembered?](#)

97

percent of expenses support local health programs

1,035

volunteer-led medical trips supported by AmeriCares in 2016

48,000

surgeries performed by volunteer medical professionals last year

6,133

shipments of medicine and supplies in 2016, an average of nearly 17 per day

\$207 million

value of medicine, vaccines and supplies delivered in 2016 to U.S. clinics

AmeriCares

HAVE A GREATER IMPACT Today and Tomorrow



Fall 2015

TIR1

Patience and Trust

Dwindling

- Impact of news reports
- Impact of Charity Navigator & Guidestar
- Growth of Charity Water, etc...

Above the law: America's worst charities

By Kris Hundley and Kendall Taggart, Special to CNN

Updated 7:50 AM ET, Thu June 13, 2013



Our History

Like 0 Tweet 0 Share 2

OUR HISTORY

Kids Wish Network was founded in 1997 by Shelley and Mark Breiner, and Shelley's mother Barbara Askin, with the mission of granting wishes to children suffering with life-threatening conditions. During Shelley's father's fight with cancer, the Breiners regularly encountered young cancer patients and their families, and witnessed firsthand the trauma of a patient's fight through treatment. Following her father's death, Shelley and Mark sold their family business and embarked on the creation of Kids Wish Network as a way to make a difference in the lives of children in need.



Our Founders, Shelley and Mark

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Newsletter Signup

E-mail Address:



Because of you...

More from



Ad Bloo



Above the law: America's worst

cha

By Kris Hu



St. Joseph's Indian School
We serve and teach, we receive and learn.

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About

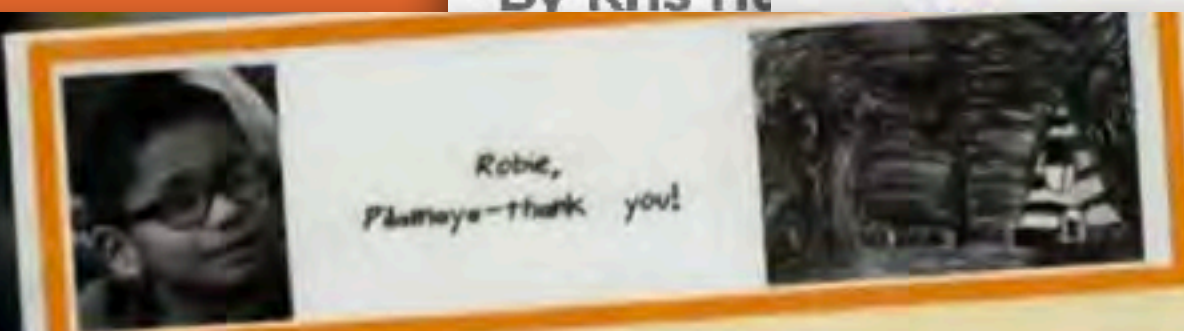
Youth Programs

Our Children

Ways to Give

Lakota Culture

Contact



Dear Robie,

When I wake up in the morning, I thank God I'm at St. Joseph's Indian School.

Like other kids here, my home on the reservation isn't a safe place for me to be. Sometimes my dad drinks and hits me. Not long ago my mom left me at my Grandma's house and she said she didn't want me anymore. She chose drugs over me.

Why I'm at St. Joseph's. That's why you help our school. You are keeping...

Josh Little Dear



#AC360

KEEPING THEM HONEST

STORIES OF FAKE STUDENTS, NATIVE AMERICAN SCHOOL RAISES MILLIONS

You may have seen or read about St. Joseph's Indian School appearing on the Anderson Cooper 360 broadcast of November 17, 2014. The broadcast showed an accurate summary of how we serve the Lakota (Sioux) children in our care. Unfortunately, the Anderson Cooper 360 show spent the rest of the segment criticizing our work to help Native American youth.

We are always happy to share our work. We are proud to carry on St. Joseph's mission, which is made possible through your generous gifts. As we do with all our visitors, we gave the crew a tour of our campus homes; the Akta Lakota Museum and Cultural Center; and the recreation center. They had a real opportunity to see the children and many of the programs available to them because of your support.

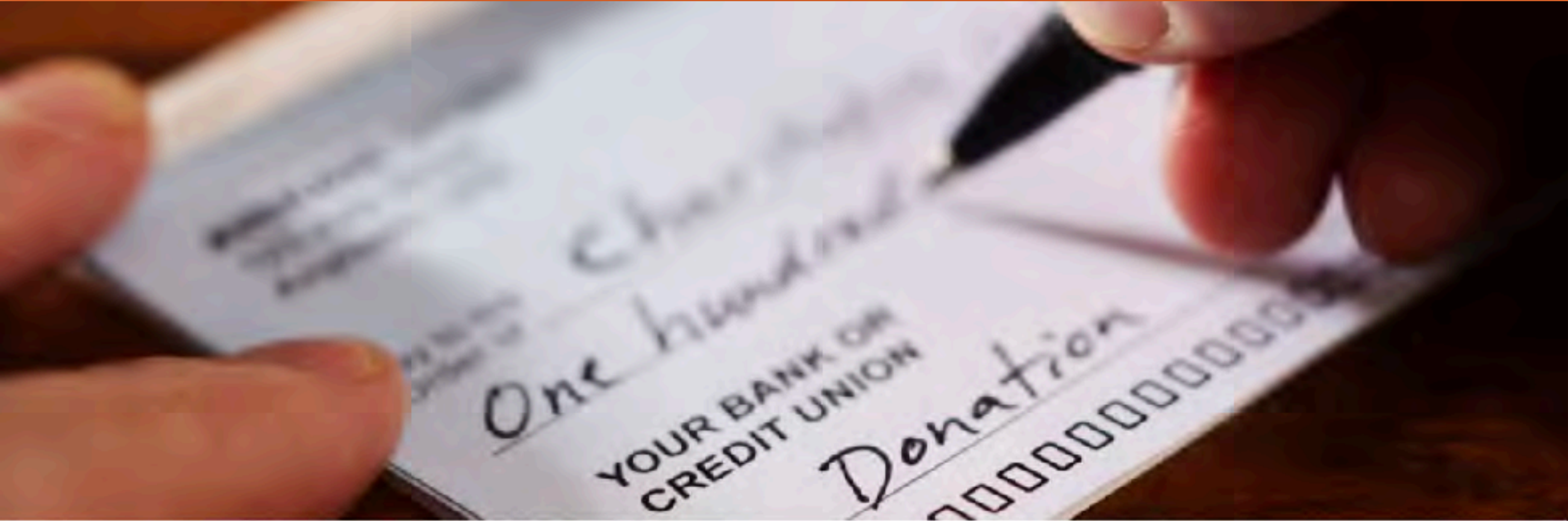
Much to our disappointment, CNN showed little interest in the Lakota students and were generally dismissive of the programs and services we provide to help them.

We want you to know the facts and assure you our mission to serve is unwavering despite this negative story. We want you to know your decision to support St. Joseph's Indian School demonstrates sound judgment regardless of how CNN has tried to portray us.

To set the record straight, we took it upon ourselves to fact check their story. Here is what we found:

- **CNN: "Stories of fake students."**

FALSE: The stories we share in our marketing information are based on real situations. However, in order to protect the privacy of the children, we do not use their real names in our letters. The photos we use are also real students, but not the photo of the child described in the letter. CNN's argument rests on saying the stories are made up. We repeatedly explained this to the executive producer, but he refused to listen.



Best and Worst Charities for Your Donations

Important tips to keep in mind in the season of giving

By Consumer Reports
Last updated: November 27, 2018

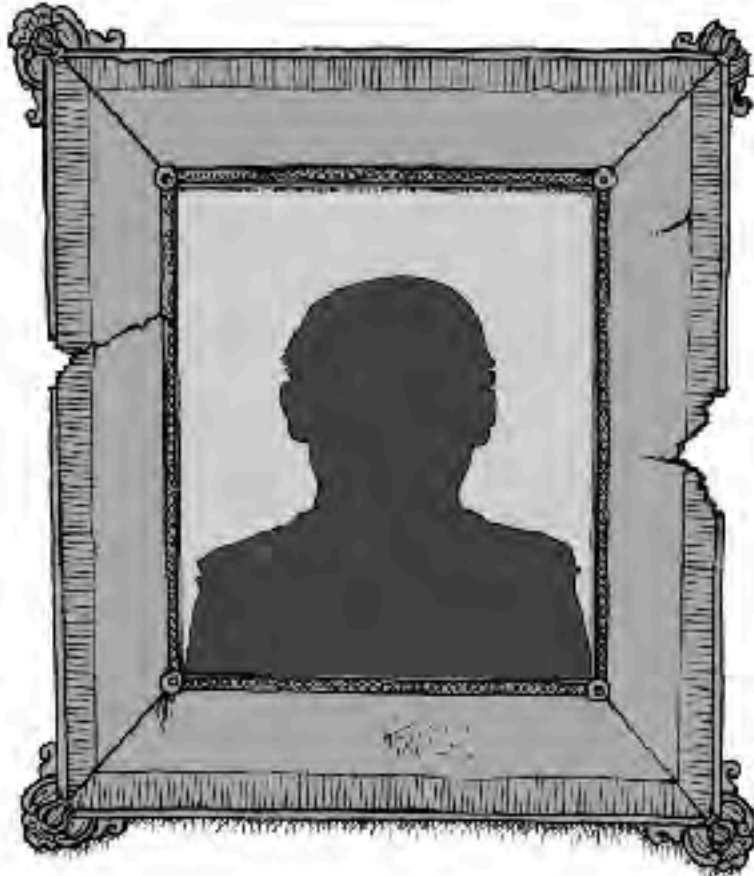


25 Years of Helping

You Give Wisely

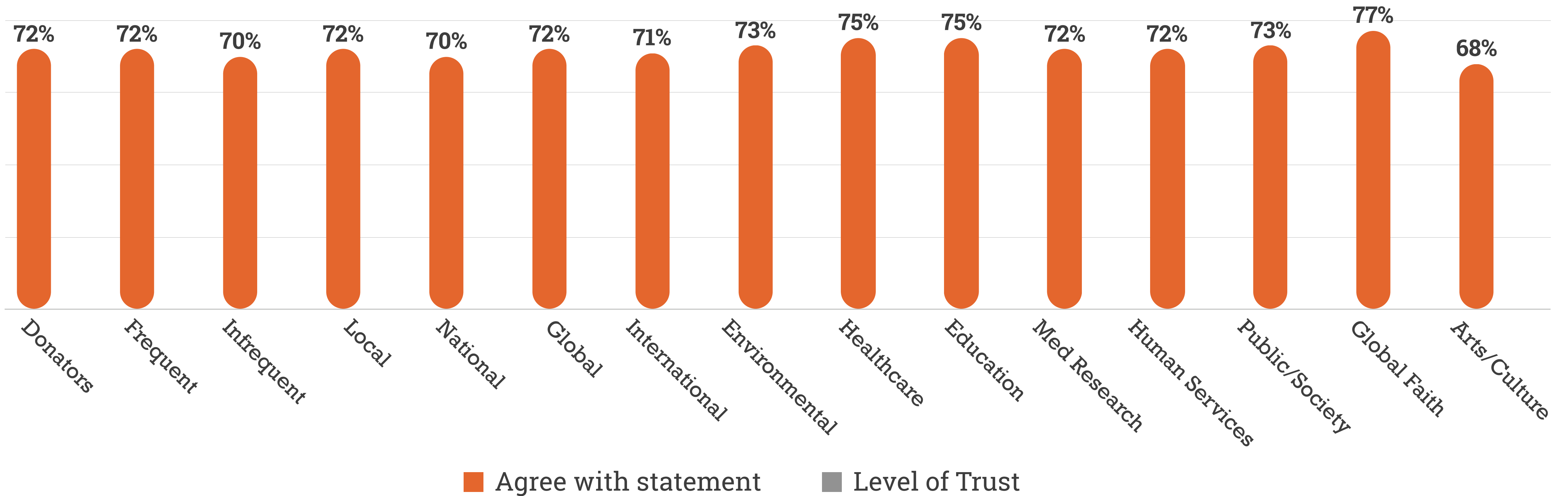
[Back to articles](#)

CharityWatch Hall of Shame



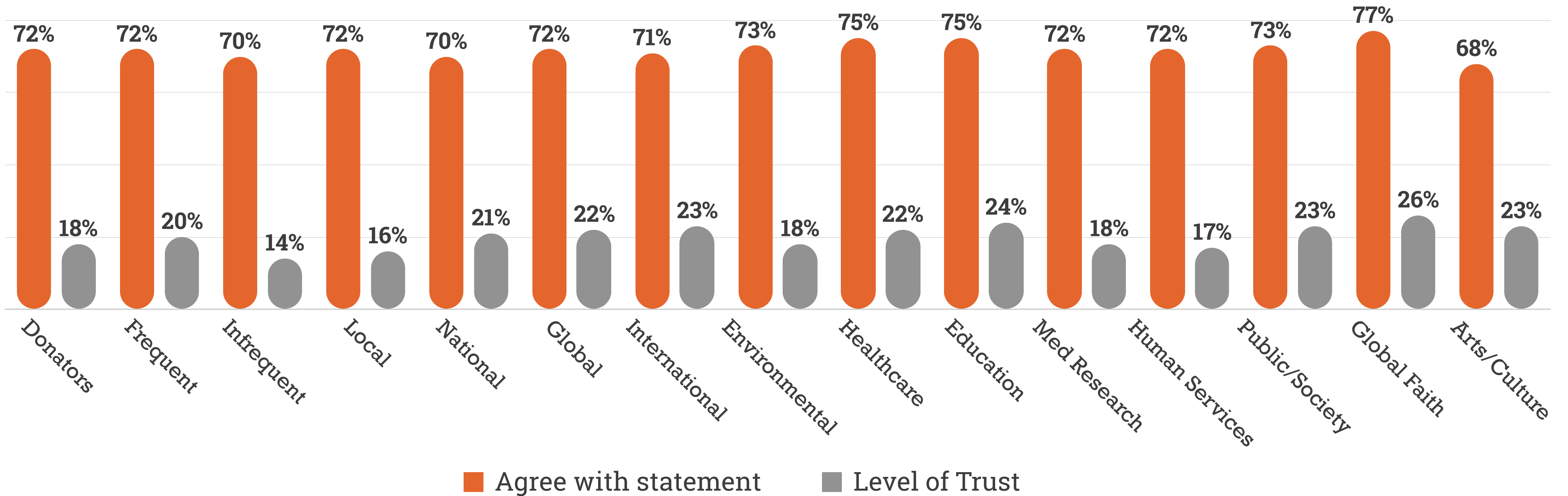
Majority Indicate They Only Donate to Organizations That Give 100% of Their Donation to The Cause, About 1 in 5 Totally Trust an Organization to Do So

% donors who indicate...



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...



Correcting the overhead myth: How Dan Pallotta's TED Talk has begun to change the conversation

Dan Pallotta:

The way we think about charity is dead wrong



TED2013 · 18:54 · Filmed Mar 2013

27 subtitle languages

View interactive transcript

Share this idea

Facebook LinkedIn Twitter Link Email Embed

4,185,676 Total views

I'M OVERHEAD.

"I manage fundraising for the Breast Cancer Alliance. My job is to get more people to give so that our researchers can do more to find a cure. My salary gets labeled as "overhead," as if the work I do doesn't go to the cause. But without the work I do and the money I raise, there is no cause. My sister died of breast cancer. That's why I do this work. I'm committed to the cause every bit as much as the doctors who do the research. I work on "the cause" every hour of the day, every day of the week. Overhead gets a bad rap. My name is Martin Hodges. I'm committed to ending breast cancer, and I'm overhead."

Martin Hodges
Breast Cancer Alliance

CharityDefenseCouncil.org

CHARITY DEFENSE COUNCIL

The Spring 

100% of your money brings clean water to people in need.

Join our monthly giving community and transform lives for families around the world. Every single penny will help bring clean water to communities in need.

[GIVE MONTHLY](#)





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:



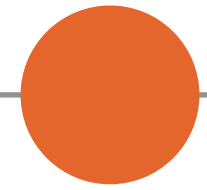
MORE THAN
\$87 million
 in Alzheimer’s disease
 research projects.



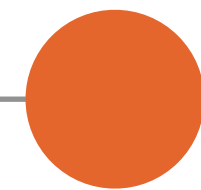
MORE THAN
\$15 million
 to scientists studying
 macular degeneration.



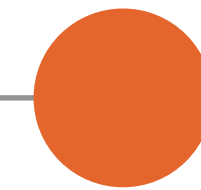
MORE THAN
\$24 million
 to scientists studying
 glaucoma.



**Generation
Shift**



**Advances in
Technology**



**Fair or Unfair
Views on Charity**

2

Understanding Today's Donor



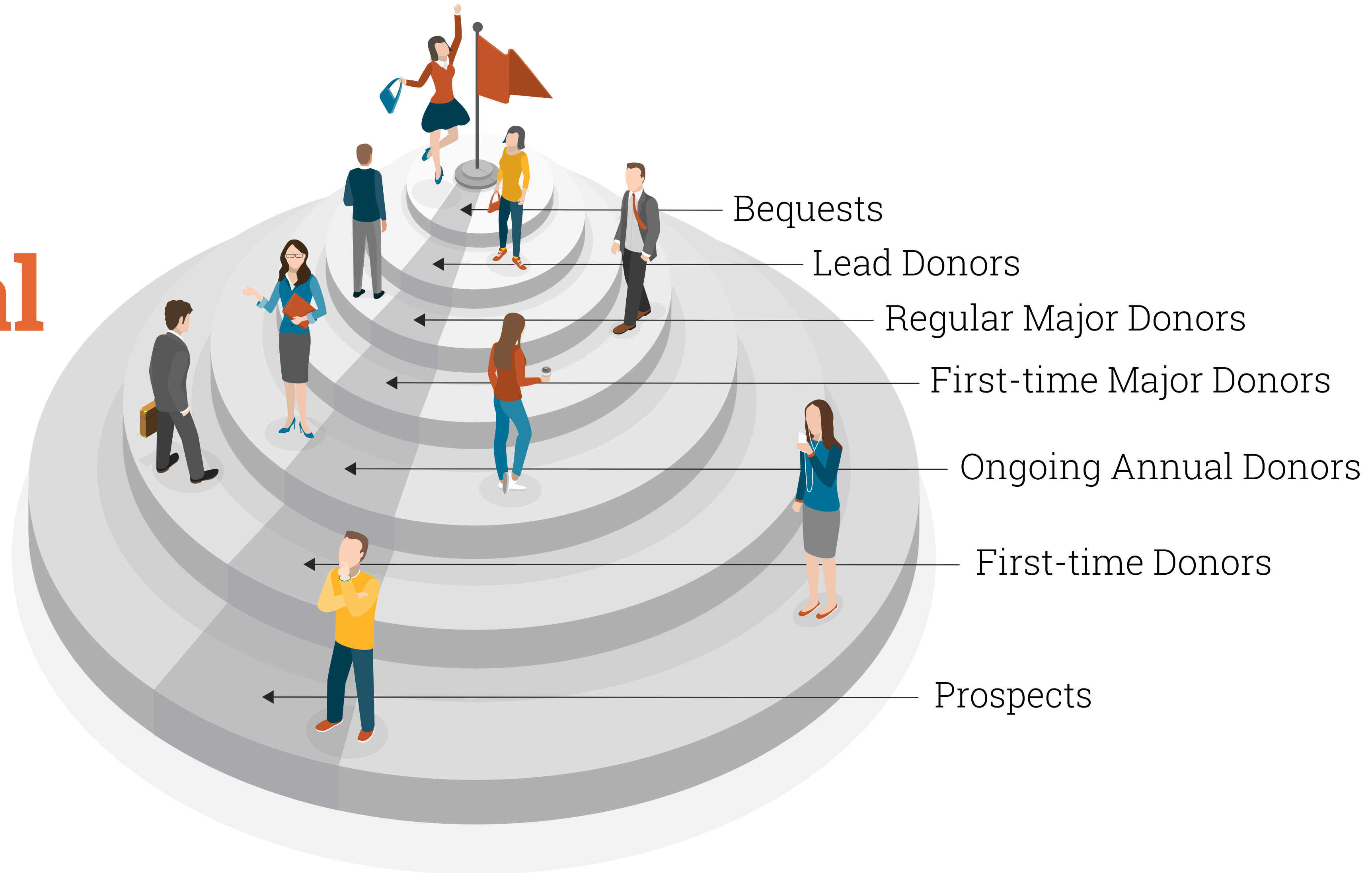
THE

66% vs. 34%

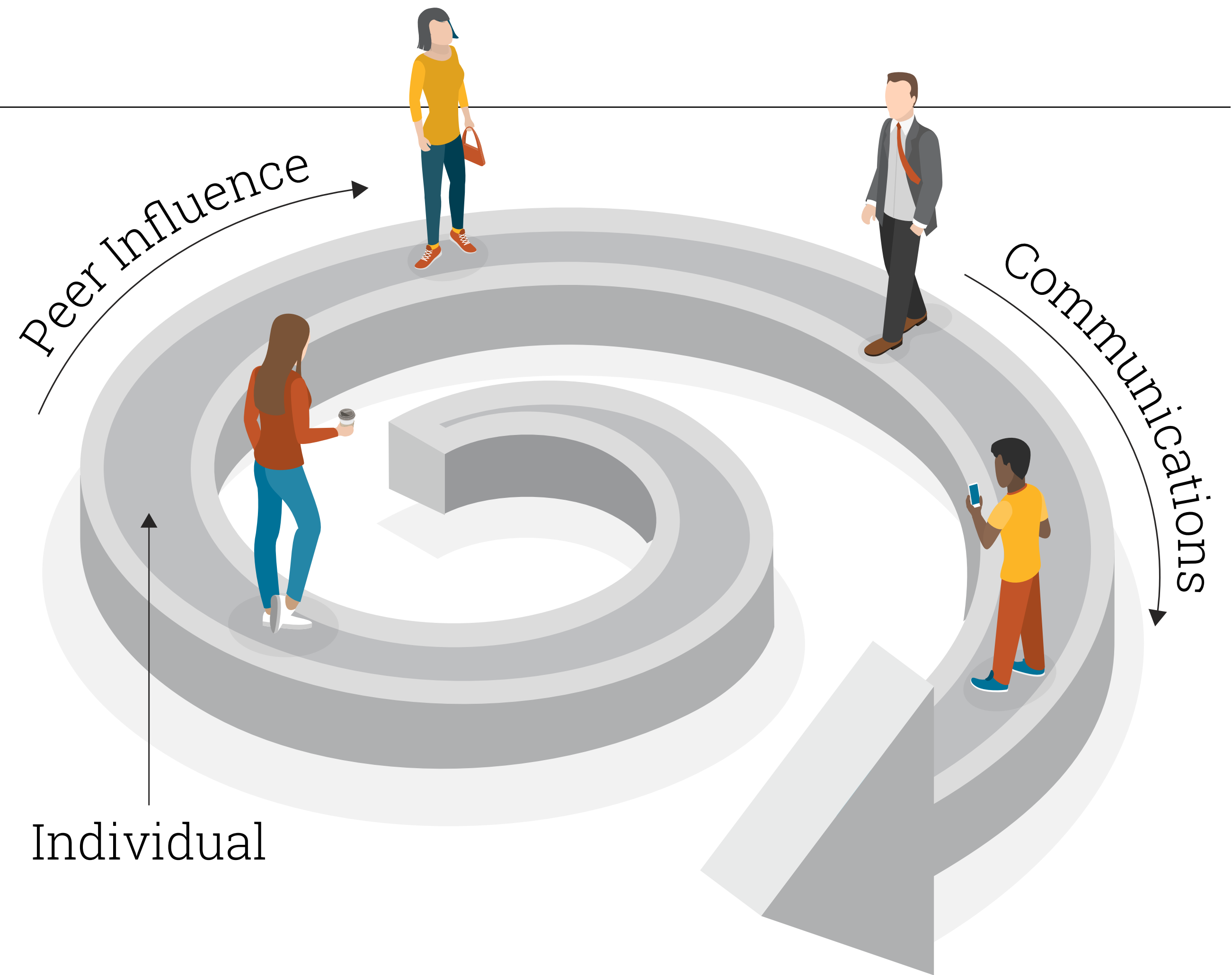
Annual Giving Unfairly Sets Expectations

ANNUAL GIVING	ISSUE	PLANNED GIVING
Many	Number of Viable Prospects	Few
High	Known Activity	Very Low
Low	Donor Cost of Entry	High
Few	Number of Stakeholders	Many
Individual Donor	Decision Maker(s)	Multiple Individuals
Self-Service	Completing the Gift	Requires Professional Assistance
Cost Per Lead	ROI Measurement	Cost Per Lead

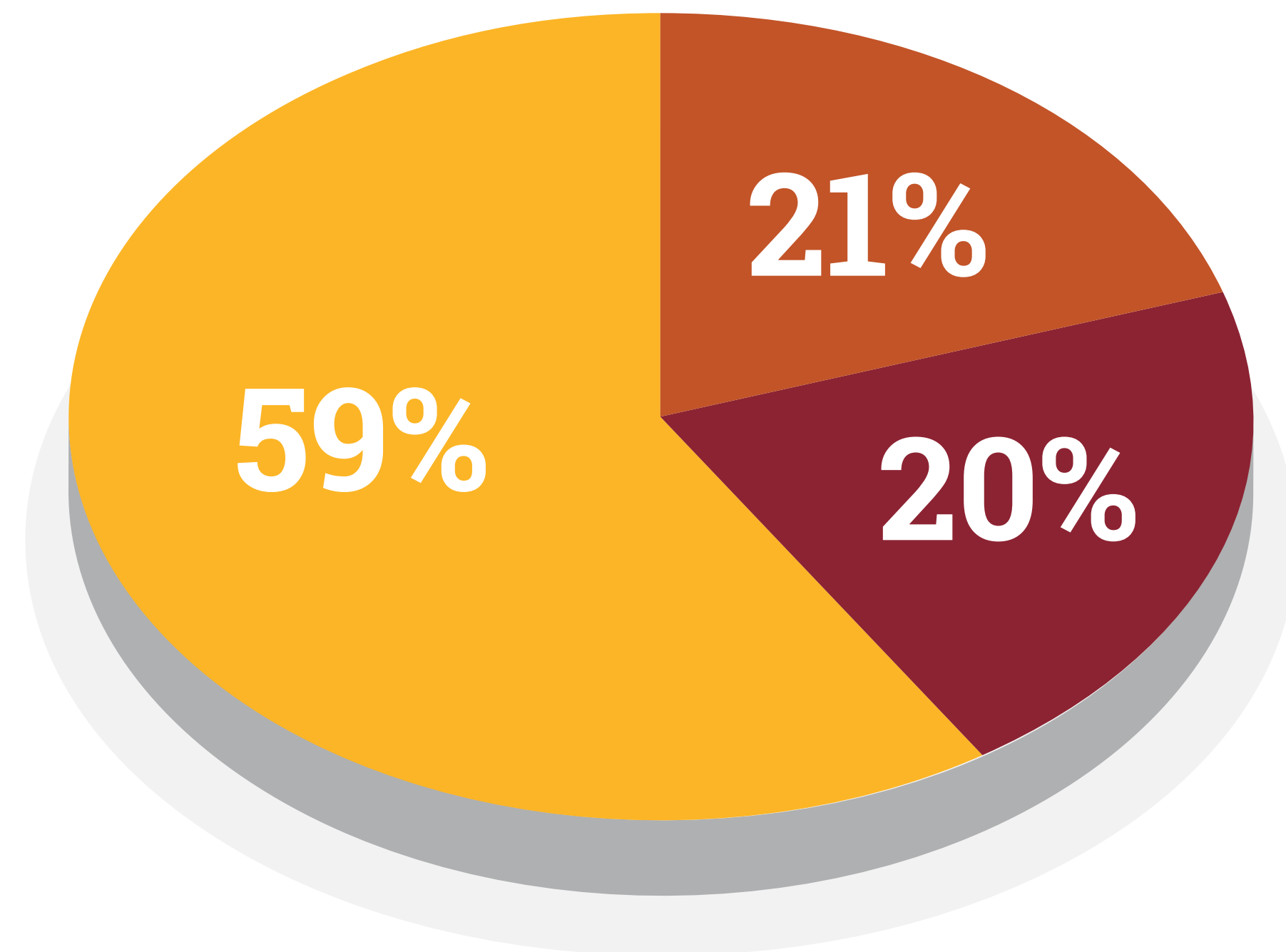
The Typical Donor Pyramid



The Donor Vortex



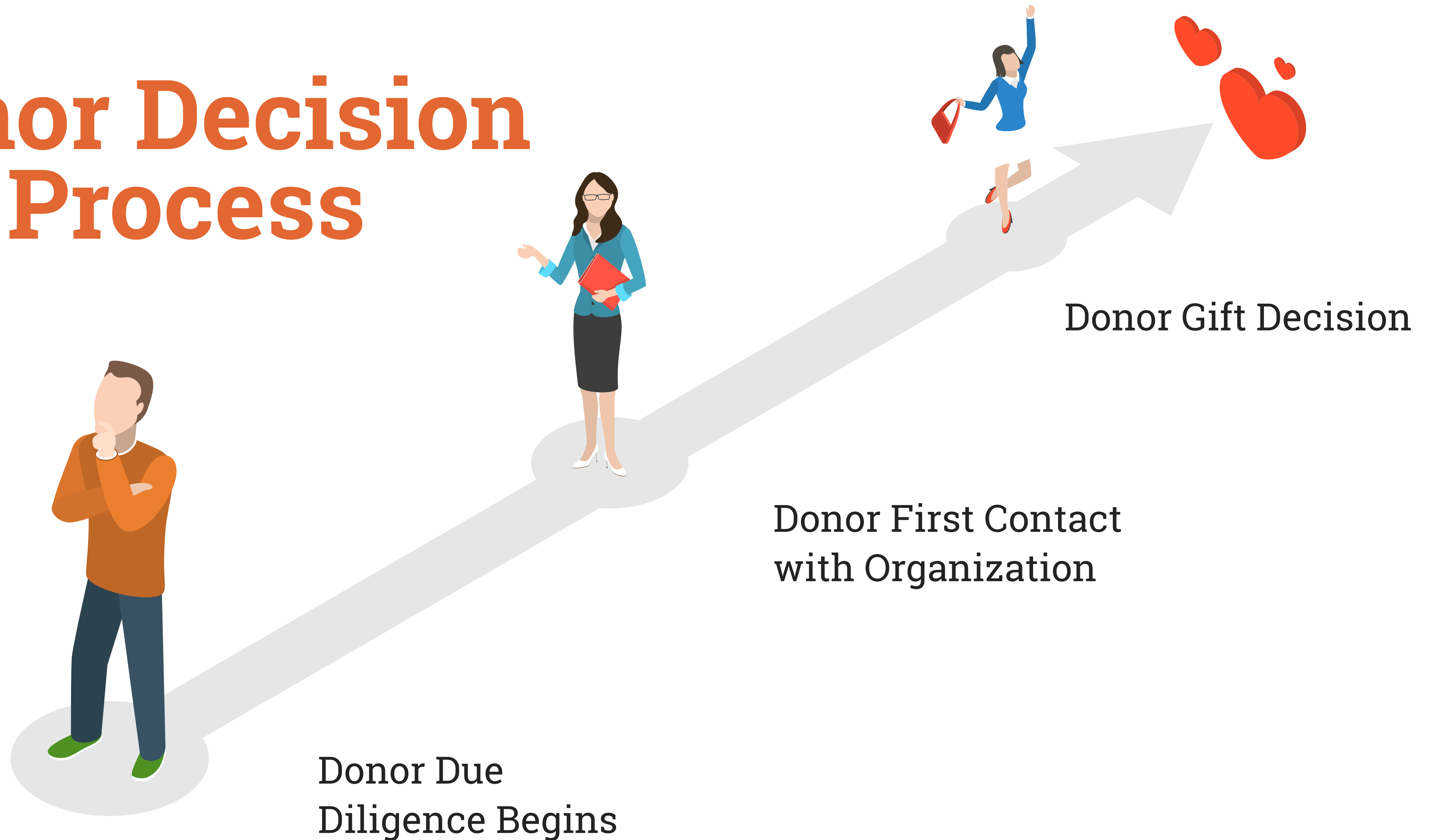
← Measurement of Engagement & Ability to Influence Others →



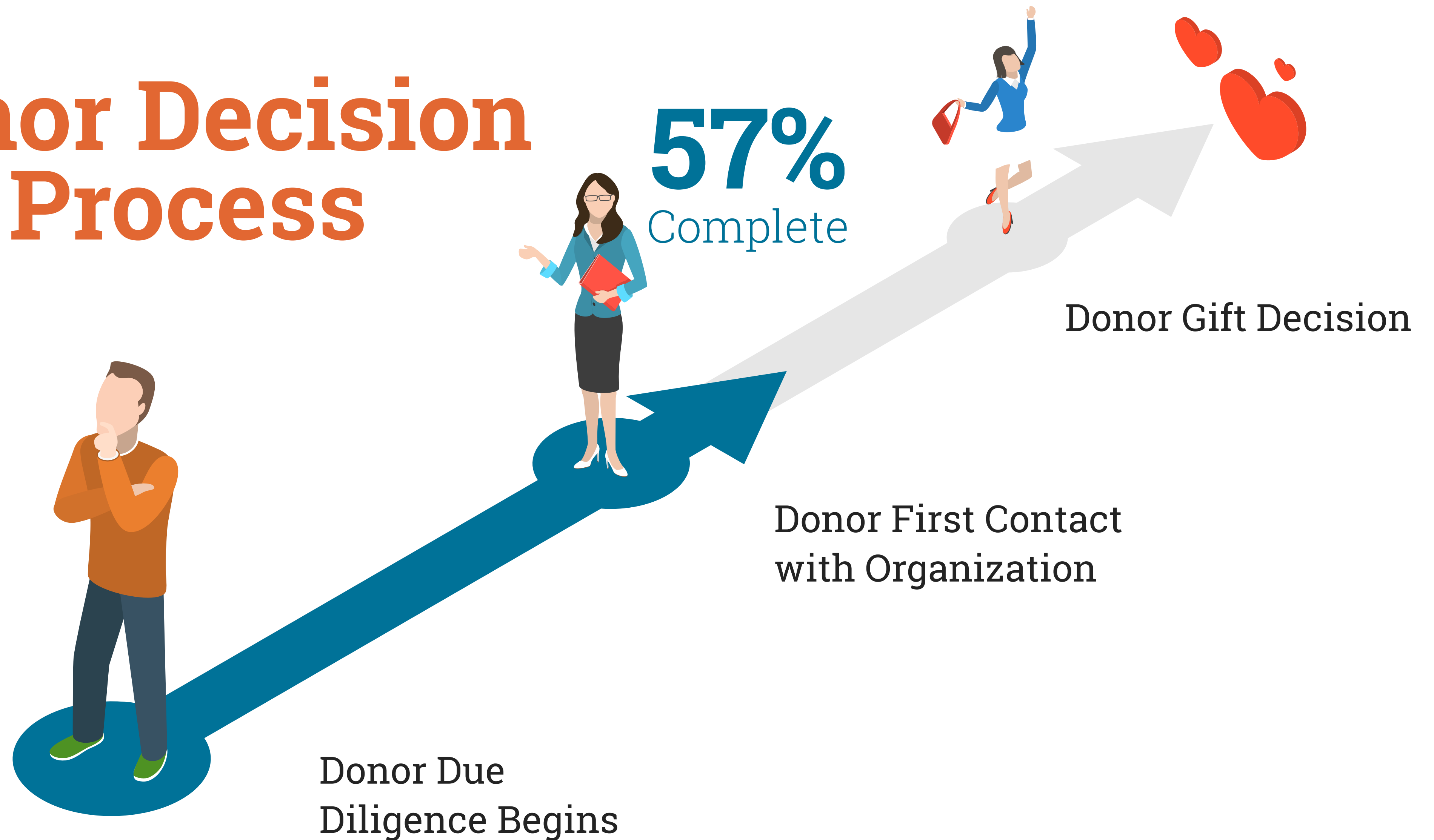
- 10+ years of consistent giving
- Less than 5 years of giving
- Never made a gift to the charity

41% of your planned giving donors may not be on your radar

The Donor Decision Making Process



The Donor Decision Making Process



ACURA
PRECISION CRAFTED PERFORMANCE

VEHICLES ▾ SHOPPING TOOLS ▾ OUR STORY ▾

Certified Owners EN ▾ Dealers

MDX 2020 ▾ **OVERVIEW** GALLERY FEATURES PRICING & SPECS **BUILD**

2020 MDX

Three-Row Luxury SUV

Starting at \$44,400

ESTIMATE PAYMENTS >

321-HP⁶⁶ SPORT HYBRID SH-AWD®
290-HP⁸¹ FWD & SH-AWD®
SEE MPG RATINGS

ACURA PRECISION CRAFTED PERFORMANCE


VEHICLES SHOPPING TOOLS OUR STORY Certified Owners EN Dealers

MDX 2020 **BUILD** \$51,400

APPEARANCE POWERTRAIN PACKAGES ACCESSORIES SUMMARY View My MDX

APPEARANCE

EXTERIOR Gunmetal Metallic \$0



REQUIRES PACKAGE UPGRADE

Color selection options: White, Silver, Gunmetal Metallic (selected), Black, Red, Blue, Brown, Dark Blue, and Black with a red checkmark.

The screenshot displays the Acura website's build configuration interface for the 2020 MDX. The top navigation bar includes the Acura logo, menu items for 'VEHICLES', 'SHOPPING TOOLS', and 'OUR STORY', and utility links for 'Certified', 'Owners', 'EN', and 'Dealers'. The main header features the 'MDX 2020' model name, a 'BUILD' dropdown menu, and a price of '\$53,300'. Below the header, a horizontal menu allows navigation between 'APPEARANCE', 'POWERTRAIN', 'PACKAGES', 'ACCESSORIES', and 'SUMMARY'. The 'APPEARANCE' section is active, showing a large image of the car's interior. To the right of the image, the 'INTERIOR' section is set to 'Ebony'. Four color swatches are shown: dark brown, black (selected with a red checkmark), tan, and grey. Below these, a red swatch is labeled 'REQUIRES PACKAGE UPGRADE'. A 'View My MDX' button is located in the top right corner of the build area.

ACURA PRECISION CRAFTED PERFORMANCE

VEHICLES · SHOPPING TOOLS · OUR STORY · Certified Owners EN Dealers

MDX 2020 BUILD \$53,300

APPEARANCE POWERTRAIN PACKAGES ACCESSORIES SUMMARY View My MDX

INTERIOR Ebony

REQUIRES PACKAGE UPGRADE

ACURA PRECISION CRAFTED PERFORMANCE

VEHICLES ▾ SHOPPING TOOLS ▾ OUR STORY ▾



Certified Owners EN 🌐 Dealers 🔍

MDX ²⁰²⁰ BUILD ▾ **\$55,700**

APPEARANCE **POWERTRAIN** PACKAGES ACCESSORIES SUMMARY [View My MDX](#) ↗

POWERTRAIN

ENGINE

 <p>3.5L V-6 Engine \$0</p> <p>MORE DETAILS ▾</p>	 <p>3.0L V-6 with 3-Motor Hybrid System \$3,500</p> <p><i>Requires Sport Hybrid Super Handling All-Wheel Drive™</i></p> <p>MORE DETAILS ▾</p>
---	---

DRIVETRAIN

⬆

ACURA PRECISION CRAFTED PERFORMANCE

VEHICLES SHOPPING TOOLS OUR STORY Certified Owners EN Dealers

MDX 2020 BUILD \$57,448

APPEARANCE POWERTRAIN PACKAGES **ACCESSORIES** SUMMARY View My MDX

ACCESSORIES

Exterior Accessories Interior Accessories

Prices shown are manufacturer suggested retail prices only. Installation cost for accessories is not included. Dealer costs may vary. Prices exclude applicable taxes. Installation or use of non-Acura-Genuine Accessories that results in vehicle damage is not covered under otherwise applicable warranties.

- Door Handle Film \$50***
Transparent, urethane film in the well of the door handle helps safeguard the paint finish from unsightly scratches from nails, jewelry, and keys.
[MORE DETAILS](#)
- Bike Attachment – Frame Mount \$188***
Requires Crossbars, Crossbars with Chrome Roof Rails, Roof Rails, Chrome
The Frame Mount Bike Attachment offers the convenience of transporting your bicycle without having to disassemble it.
[MORE DETAILS](#)
- Body Side Molding \$259***
The Body Side Molding is ideally positioned where the side panel extends out the farthest, in order to help protect your finish against door nicks and chips. Its unique shape also adds a custom element that reflects and accentuates your MDX's body style.
[MORE DETAILS](#)

The screenshot displays the Acura website's interface for the 2019 MDX. At the top, the navigation bar includes the Acura logo, 'VEHICLES', 'SHOPPING TOOLS', 'OUR STORY', 'Certified', 'Owners', 'EN', and 'Dealers'. A search icon is also present. The main content area features a large image of a red 2019 MDX SUV parked in a modern, industrial-style setting. Below the image, the headline reads 'Your Adventure Begins Here' followed by 'GET THE 2019 MDX'. A central box highlights the lease offer: '\$409/month lease' with '36 MONTHS, \$2,999 TOTAL DUE AT SIGNING'. Below this, smaller text states: 'Includes down payment with no security deposit. Excludes taxes, titles and either dealer fees or documentary service fee. For well-qualified lessees.' To the right of the main content, a price tag of '\$51,400' is shown, along with a 'View My MDX' button. Below the price, there are sections for 'PACKAGE' options, including 'Advance' and 'A-Spec' with corresponding wheel images. The bottom of the page contains a small text prompt: 'Please complete the form below. An authorized Acura retailer may reach out with product offers or to...'

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THE

“Self-Directed” Consumer Donor





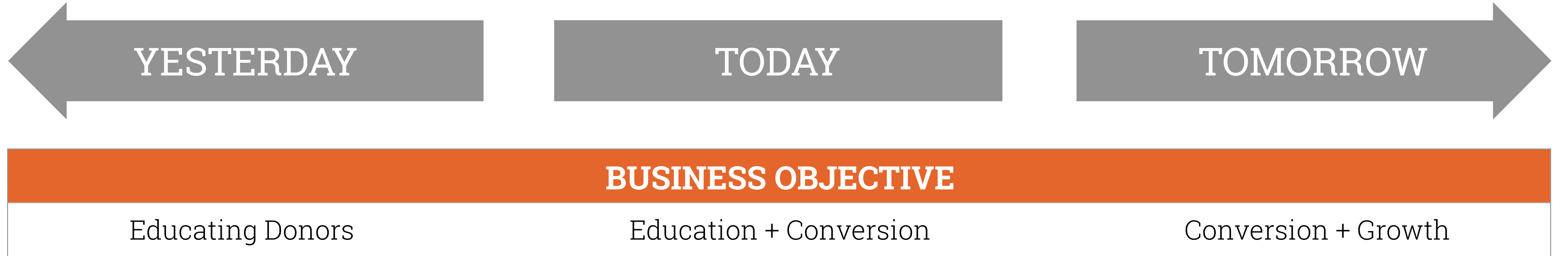
YESTERDAY



TODAY



TOMORROW





BUSINESS OBJECTIVE		
Educating Donors	Education + Conversion	Conversion + Growth

CONTENT FOCUS		
Technical (PG 101)	Impact + Technical	Impact + Viability



BUSINESS OBJECTIVE

Educating Donors	Education + Conversion	Conversion + Growth
------------------	------------------------	---------------------

CONTENT FOCUS

Technical (PG 101)	Impact + Technical	Impact + Viability
--------------------	--------------------	--------------------

AUDIENCE

Older-Oldest Americans	Multi-Generational	Multi-Generational
------------------------	--------------------	--------------------



BUSINESS OBJECTIVE

Educating Donors	Education + Conversion	Conversion + Growth
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CONTENT FOCUS

Technical (PG 101)	Impact + Technical	Impact + Viability
--------------------	--------------------	--------------------

AUDIENCE

Older-Oldest Americans	Multi-Generational	Multi-Generational
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STRATEGY

NFP Controls Conversation	Donor-Centric	Donor-Driven
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Thanks to scholarship support, Marissa Carlson is pursuing her passion for bringing enjoyment to others.

Insights

A Silent Force

With passions for business and working with people, junior Marissa Carlson deemed hospitality management the perfect major to study at Iowa State. "I love being behind the scenes of people's vacations so that they can enjoy every second of their getaway without worry," she said. "I take pleasure in being the silent force that allows guests to relax and have fun."

At Iowa State, Carlson is involved with numerous student groups, including serving as the fiscal director for Human Sciences Week and treasurer for Stars with Soap, an organization that seeks to provide basic necessities to the nation's most underfunded schools. This past summer, Carlson also worked as a marketing intern with Pinstripes, a restaurant and event venue that combines food with bowling and bocce ball.

Carlson plans to use her skills in hospitality management to work for a cruise line, country club or resort after graduation. "It's my dream to be in charge, helping to

make a business run smoothly and positively impact any employee, coworker or guest I work with."

Scholarships like the Anne Shaner Hotel, Restaurant and Institution Management Award allow Carlson to fully immerse herself in hands-on experiences at Iowa State. "The field I have chosen to study isn't one where I know I will make lots of money but is one I'm very passionate about. Scholarships enable me to focus on my studies without worrying about my financial situation. I'm thankful to donors for making attaining a higher education possible!"

Inside This Issue

From chairperson of the annual cherry pie sale in the '50s to creating scholarships for this and future generations of Iowa State students, Anne Shaner has always given back to Iowa State in creative and meaningful ways.





JOIN US

100 YEARS IS JUST THE BEGINNING

led by the League's Centennial, longtime donor and Director Peggy Light pledged a \$500,000 legacy gift through her estate and offered this bold idea.

when
100 LEGACY DONORS
 come forward in 2018
PEGGY LIGHT
 will give
\$100,000
 in 2018 and
\$400,000
 as a future gift

From right: Peggy Light, with fellow League Councilor Christa Lyons and Martha Helms



OUR CENTENNIAL VISION

Save the Redwoods League envisions vibrant redwood forests of the scale and grandeur that once graced the California coast and the Sierra Nevada, protected forever, restored to grow old again, and connected to people through a network of magnificent parks and protected areas that inspire all of us with the beauty and power of nature.

BE ONE OF THE 100

Join Mike Helms, Peggy Light, and other dedicated legacy donors at the dawn of the League's second century. The favor of your reply is requested by **July 16**.

- I am interested in joining other supporters of the redwood forests by becoming a member of the Redwood Legacy Circle.** Please contact me with more details about how I can support the forests' future with a planned gift, and generate \$1,000 today.
- I accept with pleasure.** I have already included Save the Redwoods League in my estate plan, but have not previously informed you. Please contact me so that I can officially be counted among the 100, and generate \$1,000 for the League today!

 Name (Please print.)

 Address

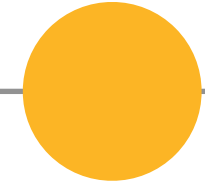
 City, State ZIP

 Telephone Email

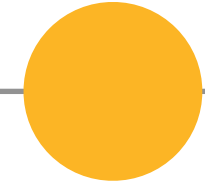
We respect your privacy. Information collected here will not be shared outside of our organization.

that fits my family legacy."

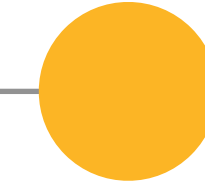
— Peggy Light



**Pyramid vs.
Vortex?!**



**Change in
Decision Making**



**Now and
Tomorrow**

3

What Does This Mean For You?



UNDERSTANDING THE

Tactics and Tools

.....

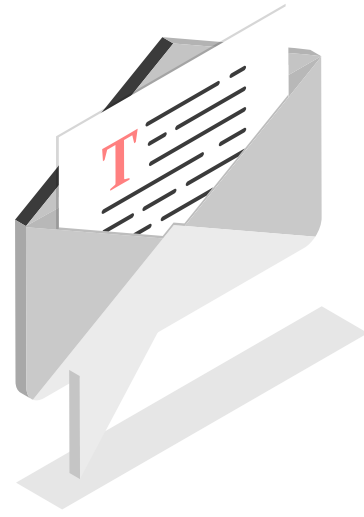
Marketing Drivers



Direct
Mail



Targeted
Mail



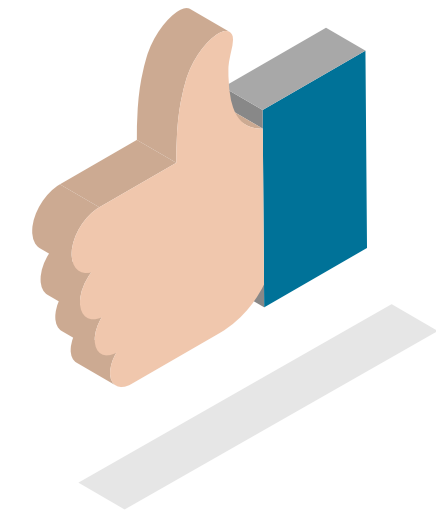
Educational
Email



Targeted
Email



Mail & Email
Survey

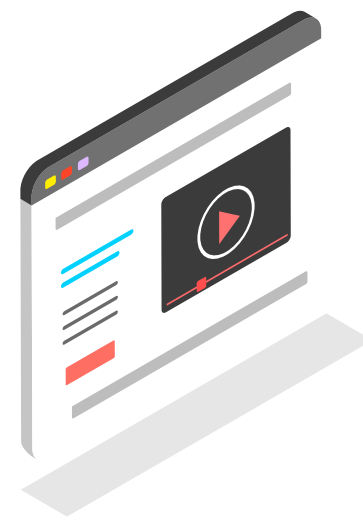


Social

Marketing Destinations



Collateral



Landing Page



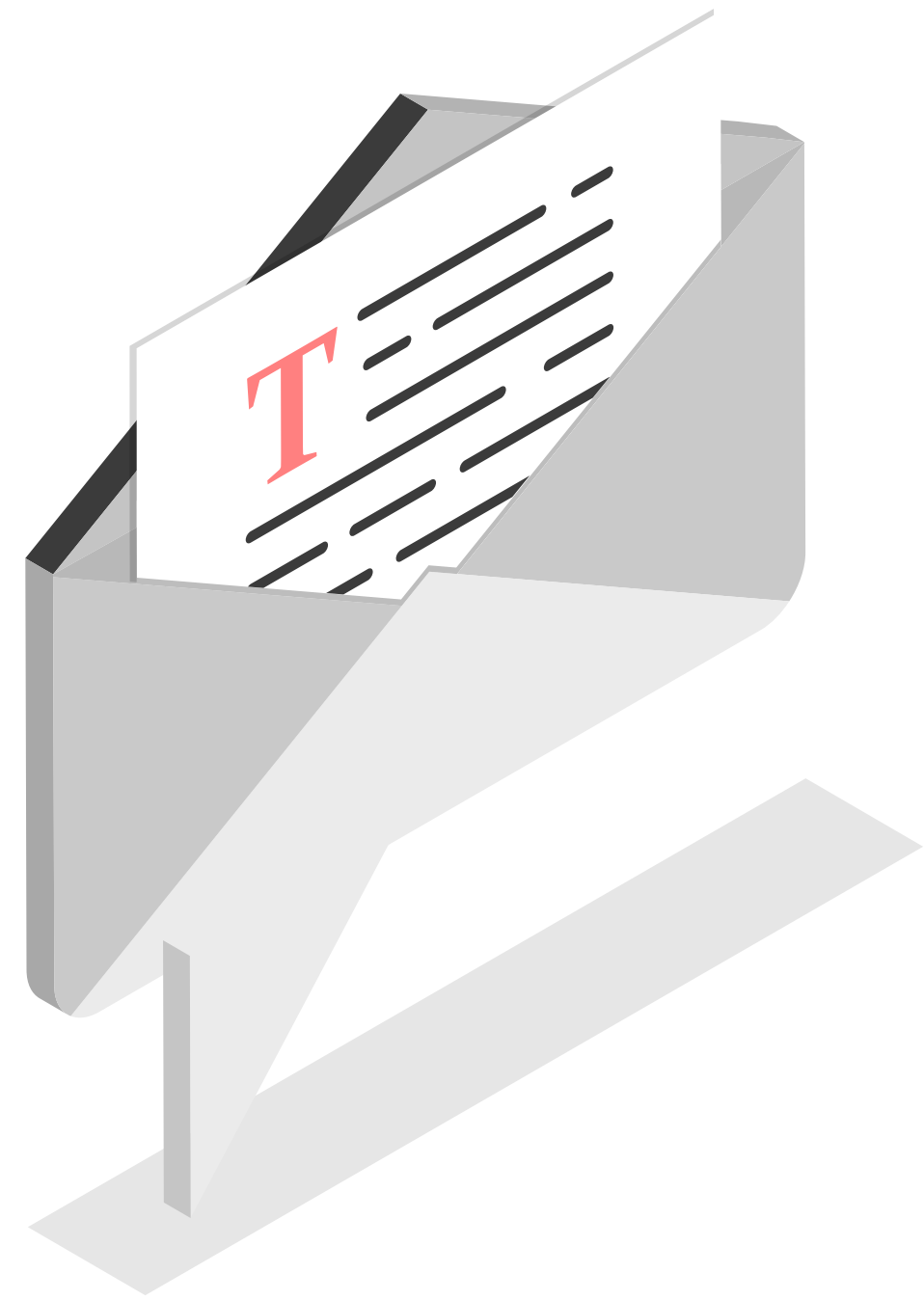
P/G Website



Targeted Email

A Coupon to Your Favorite Restaurant

The marketer knows a little about your interests and is enticing you to connect





Educational Email

Magazine Cover

To sell what's inside and to inspire further reading

Targeted Email

Become a Legend at LSU

TAF
LSU TIGER ATHLETIC FOUNDATION

When you make a legacy gift to the Tiger Athletic Foundation, you ensure that future generations of LSU student-athletes have the same experiences as the legends who came before them. When you make a gift TODAY, your name will live among those of legends on a new TAF Legends Society plaque inside Tiger Stadium.

[TAF Legends Society >](#)

If you have already made a gift to the Tiger Athletic Foundation, or you need additional information about how your gift will benefit future student-athletes, let me know, I would be happy to help.

Contact me
Bunnie Cannon
225.578.0302
BunnieC@lsutaf.org

Tiger Athletic Foundation
P.O. Box 711 | Baton Rouge, LA 70801

The Tiger Athletic Foundation respects your online time and privacy. If you no longer wish to receive this planned giving e-newsletter, please click [unsubscribe](#).

[VIEW ONLINE](#)

Educational Email




CREATE A LEGACY

Dear Shayna,

People affected by MS are relying on us to do whatever it takes to accelerate breakthroughs—life-changing breakthroughs that enable people to live their best lives today, and research breakthroughs that will ultimately end MS forever.

Because of your support in 2016, we invested over \$54 million in more than 380 new and ongoing research studies around the world. We couldn't have done any of it without you. **Together we are stronger.**

I'm confident that together we can change the world for each and every person living with MS. In the articles below, we'll show you how you can make a gift that helps us move toward a world without it.

Taylor Mallia
Vice President, Individual Giving



Foundation Gift to Expand National MS Society's Wellness Plan

Eric Hovde believes diet and exercise are the key to living with MS. His gift to the National MS Society will help spread this message of wellness to others with the disease.

[Read more](#)

Targeted Email

Become a Legend at LSU

TAF

LSU TIGER ATHLETIC FOUNDATION

When you make a legacy gift to the Tiger Athletic Foundation, you ensure that future generations of LSU student-athletes have the same experiences as the legends who came before them. When you make a gift TODAY, your name will live among those of legends on a new TAF Legends Society plaque inside Tiger Stadium.

[TAF Legends Society >](#)

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[VIEW ONLINE](#)

Educational Email

National MS Society's Wellness Plan

Eric Hovde believes diet and exercise are the key to living with MS. His gift to the National MS Society will help spread this message of wellness to others with the disease.

[Read more](#)

Donna
DIAGNOSED IN 1989

4 Gifts That Make a Meaningful Difference All Year Long

Discover easy ways you can help others and make a difference at the National MS Society for years to come.

[Read more](#)

Beth
DIAGNOSED IN 2009

Wills vs. Trusts: 4 Factors to Help You Choose

Discover which one of these important estate planning documents is the best fit for your family's needs.

[Read more](#)

Change Lives With Life Insurance

Your Personal Estate Planning Kit

Research Updates

We're Here to Help

Do you have questions regarding planned giving or other ways to support our mission?

Our planned giving team is here to help.

National Multiple Sclerosis Society
500 South Broadway, 2nd Floor
Denver, CO 80209

800-923-7727

giftplanning@nmss.org

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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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Estate planning allows you to no matter what twists and turn

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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

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Address 1:

Address 2:

* City/State/ZIP: City State ZIP

Download My FREE Estate Planning Course Lesson Book Today »



ge or assets.



OW
causes you care about most,
more today.

Boost Post





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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.

[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.

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Veterans of Foreign

Just now

Estate planning is for every



1 Simple Thing YOU

Estate planning allows you to no matter what twists and turn

HEROES.VFW.ORG/ESTATEPL

Like - Comment - Share

Class Is



Name:

Email:

Address 1:

Address 2:

City/State:

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ge or assets.



OW

causes you care about most, more today.

[Boost Post](#)



Planned Giving Website

Library of Information

A choose-your-own adventure journey where the donor selects how they browse, an infinite resource

Make Your Planned Giving Website a Donor Experience





Join Us in Transforming Lives

As one of the nation's leading public research universities, The University of Texas at Austin has a worldwide impact. Your support of UT Austin also extends far. When you include UT Austin in your estate plan, your generosity provides superior educational opportunities that equip the next generation of Longhorns to become innovative leaders in their professions and in their communities. **Thank you for helping UT change the world.**

Let Us Know

- I have included The University of Texas at Austin in my estate plan.
- I intend to include The University of Texas at Austin in my estate plan.
- I would like to learn more about The University of Texas at Austin in my estate plan.



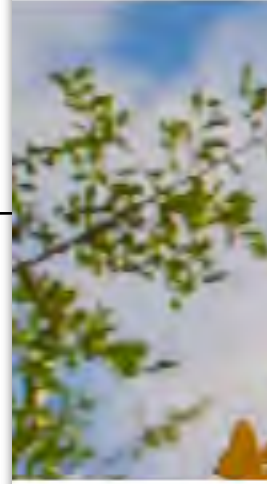
Free Estate Planning Materials

Protect your assets and give to those you love and support. These two free resources can help you **get started**.



A Gift That Works for You

Consider a **gift in your will**, a **beneficiary designation**, or **leveraging your IRA** to support future Longhorns.



Popular Gifts

- Wills and Living Trusts
- Beneficiary Designations

Income Gifts

- Charitable Gift Annuities
- Charitable Remainder Trusts

Smart Ways to Give

- IRA Charitable Rollover
- Memorials and Tribute Gifts
- Real Estate
- Endowments
- Donor-Advised Funds
- Charitable Lead Trusts
- Closely Held Stock
- Land and Mineral Interests

More Resources

- Why We Give
- Become a Member
- Texas Leader Magazine
- Contact Us

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Sample Language for Your Will

I hereby direct \$ _____ (or ____ percent of my residual estate) in cash, securities, or other property to the Board of Regents of The University of Texas System for the benefit of The University of Texas at Austin. This gift shall be for the further benefit of _____ [college, school, unit] _____ and shall be used to _____ [purpose] _____.

Tax ID number 30-0710145

Free Resources



Contact us about how you can create your philanthropic legacy at UT.
[Read more](#)



Get a personalized look at how your gift can make a difference.
[Read more](#)



See the many benefits of becoming a member of the Texas Leadership Society.
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Gift in Your Will or Living Trust

You want to leave money to The University of Texas at Austin in your will. You also want the flexibility to change your will in the event that life circumstances change. You can do both.

In as little as [one sentence](#), you can complete your gift. This type of donation to the University in your will or living trust helps ensure that we continue our mission for years to come.

Start Today

Download your FREE copy of *A Guide to Making Your Will*.

[Get My Guide >](#)

An Example of How It Works



Meet Tom and Martha. When they got married and created a will, they included a \$75,000 gift to the University. As the family grew to include three children, Tom and Martha decided to revise their gift to ensure their children's future financial security.

They met with their attorney and revised the gift language so that the University received a percentage of their estate, instead of a specific amount. Tom and Martha now rest easy knowing their plans will provide for the people they love, as well as the future strength of a Longhorn education.

[Watch How It Works >](#)

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Watch How It Works >



Free Estate Planning Materials

Download My FREE Personal Estate Planning Kit

Fund Your Donation With

- Cash
- Appreciated Securities
- Real Estate
- Tangible Personal Property
- Closely Held Stock

Next Steps

1. Contact the Gift and Estate Planning Team at 512-475-9632 or giftplan@austin.utexas.edu for additional information on bequests or to chat more about the different options for including the University in your will or estate plan.
2. Seek the advice of your financial or legal adviser.
3. If you include the University in your plans, please use our legal name and federal tax ID.

Legal Name: Board of Regents of The University of Texas System for the benefit of The University of Texas at Austin

Address: P.O. Box 7458 Austin, TX 78713

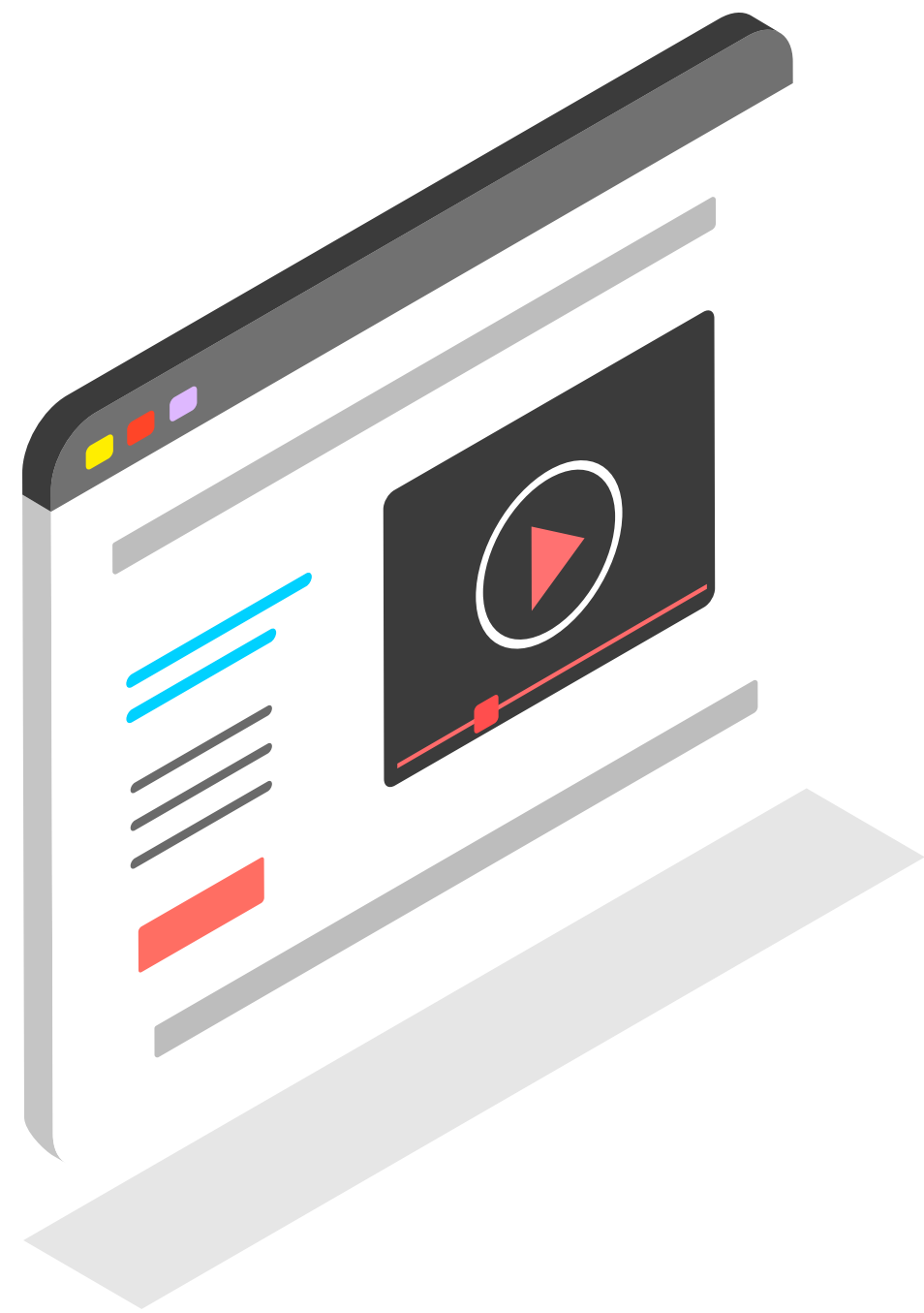
Federal Tax ID Number: 30-0710145



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- Web Accessibility Policy
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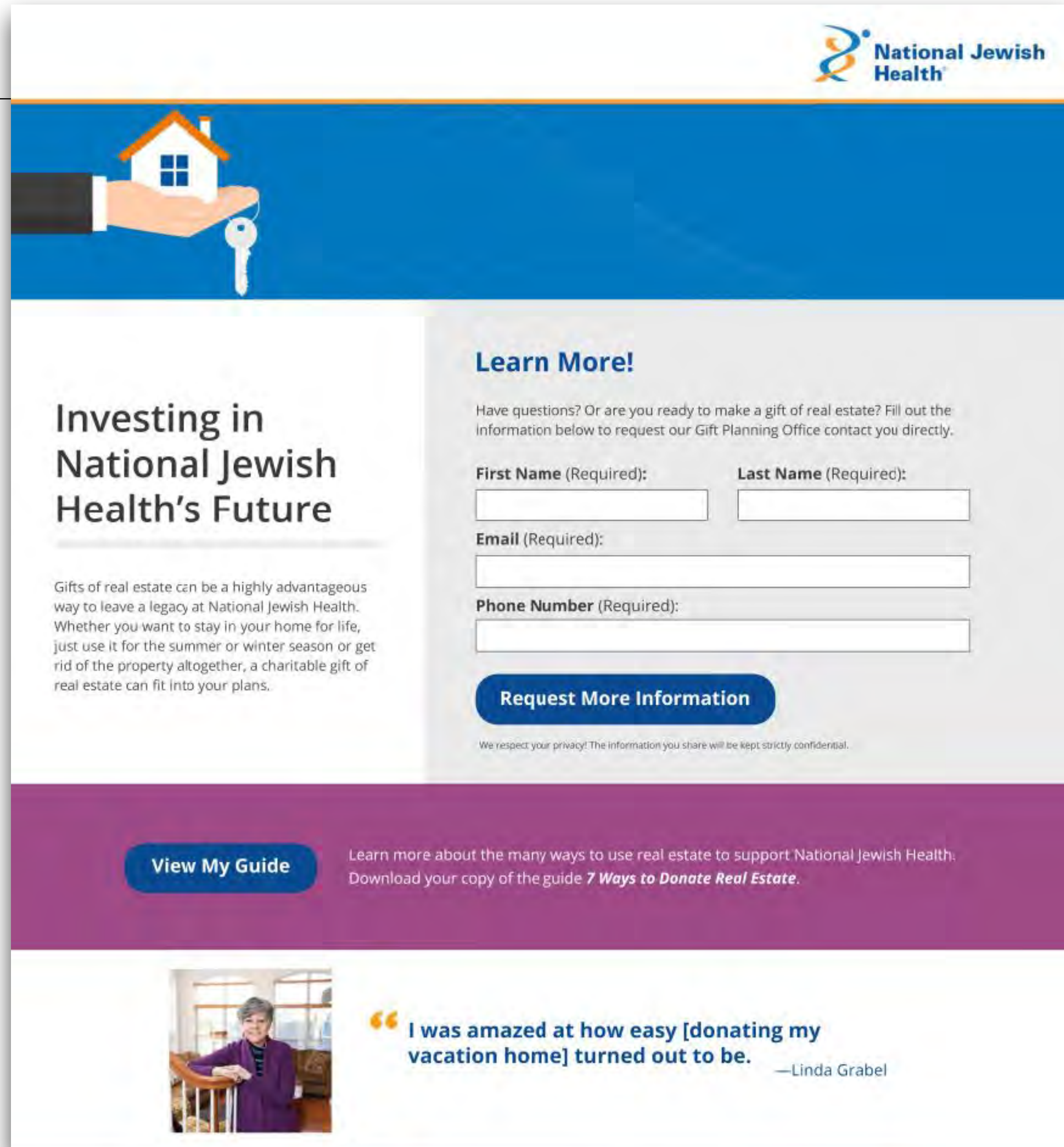
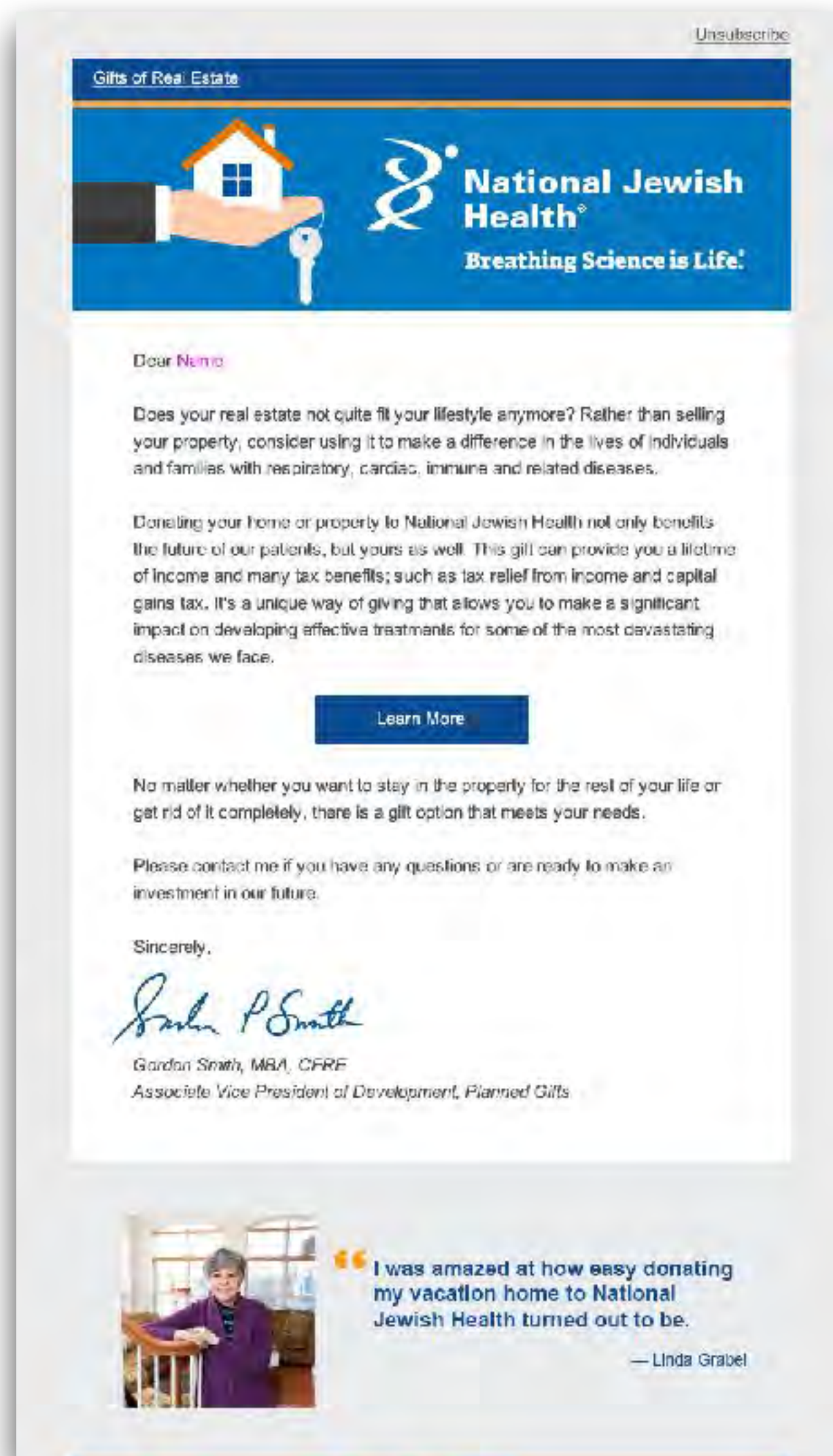


Landing Page

Your Friend's Facebook Page

Took an action to get from your wall to their page—you wanted to see all the family pictures

Landing Page





Focus Your Message

.....

Importance of Estate Planning Documents

Women

45% Very Important
30% Have a Will

.....




Men

41% Very Important
35% Have a Will

.....

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

Forward to a friend: 



Dear fName,

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

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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.

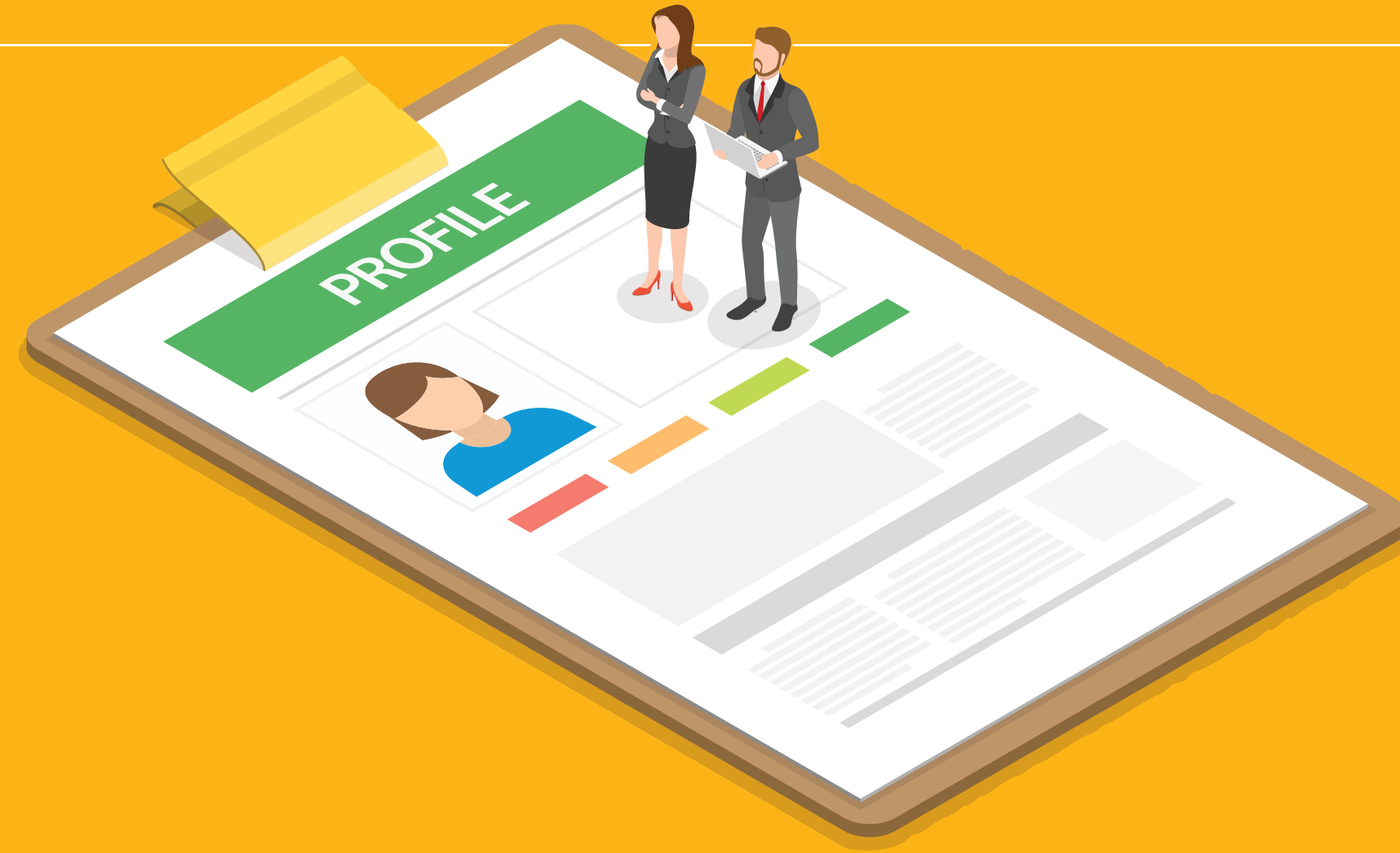


American University
4400 Massachusetts Avenue, NW
Washington, DC 20016-8143

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



Make It Personal

.....



@Name@
@Street2@
@Street@ @Unit@
@City@ @State@ @Zip@ @Zip4@

The holidays are quickly approaching; the season when families gather and children dream big. For many people living in America, it's a time of abundance—it's also a time of waste.

During the holidays and year-round, an enormous amount of food is wasted in the United States. The food supply chain alone wastes about 72 billion pounds of healthy food each year. This, while 42 million people struggle with hunger—including _____ people living in _____. So while you may not realize it, you likely know someone who doesn't have enough to eat.

You can help. This holiday season, give a gift from your will to Feeding America®.

At Feeding America, we're working hard to end hunger—in _____ and throughout the country. But a hunger-free America won't happen overnight. That's why I'm asking you to make a powerful, long-term commitment to bring nutritious food to people in need. Your future gift will fortify a network of more than 200 foodbanks. And you'll advance our food rescue program, which puts nutritious food destined for waste into the hands of people facing hunger.

I hope you enjoy the enclosed issue of *Fighting Hunger Today and Tomorrow*, which shows how you can help lift the burden of hunger for future generations.

Thank you for all that you do for Feeding America. You make our work possible.

Sincerely,

Jessica Noe
Senior Manager, Development
and Planned Giving



P.S. Do you know someone who feels passionate about ending hunger in America? Honor them with a gift from your will. Learn more in our free guide, *Give From the Heart With a Tribute Gift*. Simply return the enclosed reply card today!

National Office
35 E. Wacker Drive
Suite 2000
Chicago, IL 60601
tel 312.641.5593
feedingamerica.org

Personalized salutation



@Name@
@Street2@
@Street@ @Unit@
@City@ @State@ @Zip@ @Zip4@

Dear Salutation,

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National Office
35 E. Wacker Drive
Suite 2000
Chicago, IL 60601
tel 312.641.5593
feedingamerica.org

Personalized salutation Number of food insecure people



@Name@
@Street2@
@Street@ @Unit@
@City@ @State@ @Zip@ @Zip4@

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Suite 2000
Chicago, IL 60601
tel 312.641.5593
feedingamerica.org

Personalized salutation
Number of food insecure people
State specific statistics



@Name@
@Street2@
@Street@ @Unit@
@City@ @State@ @Zip@ @Zip4@

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Chicago, IL 60601
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Personalized salutation
Number of food insecure people
State specific statistics
State personalization



@Name@
@Street2@
@Street@ @Unit@
@City@ @State@ @Zip@ @Zip4@

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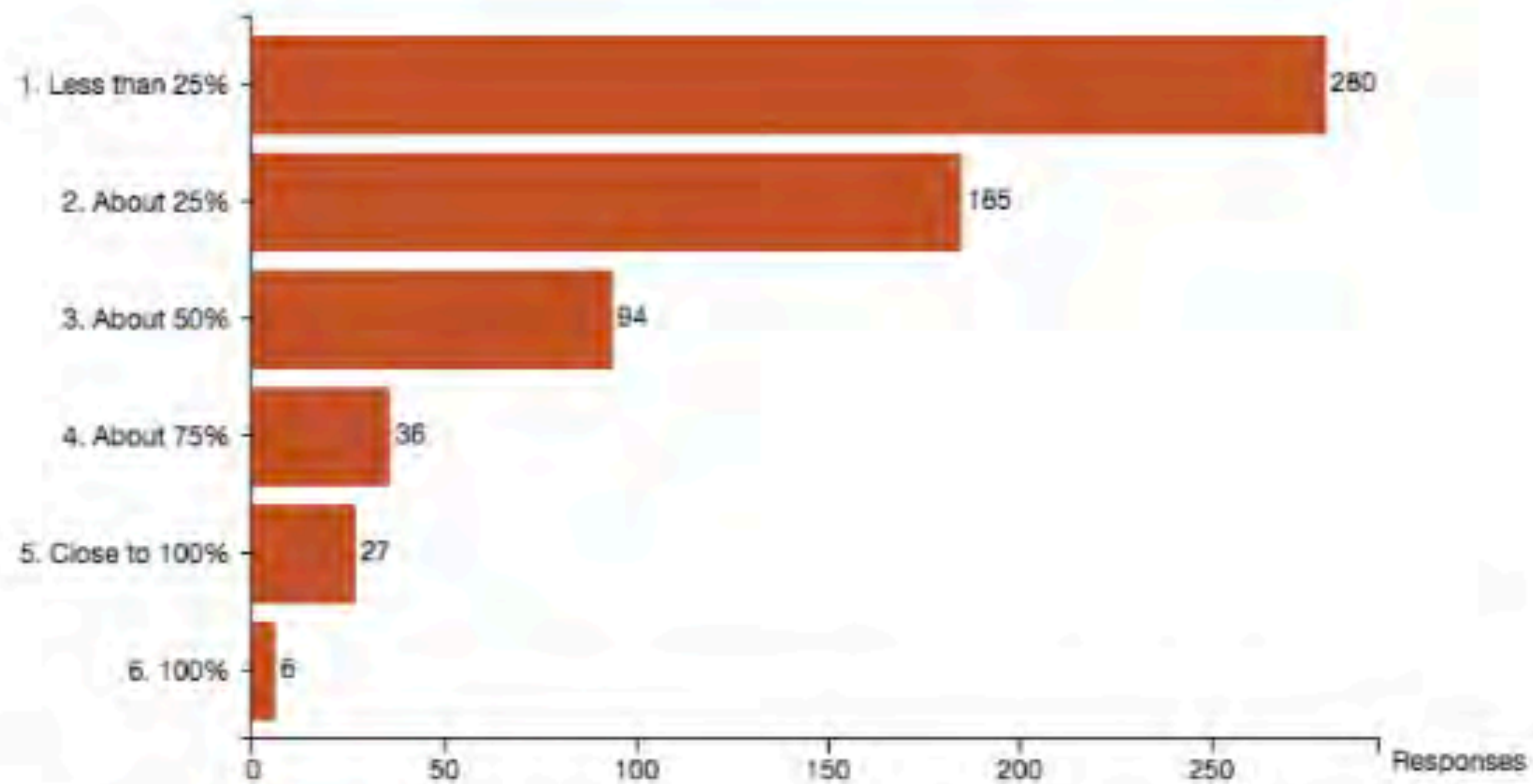


SEGMENT AND TARGET WITH
New Marketing Tools

Planned Giving Survey

- Low hanging fruit
- Build your pipeline
- One on one discovery
- Understanding donor affinity
- Shortened feedback loop



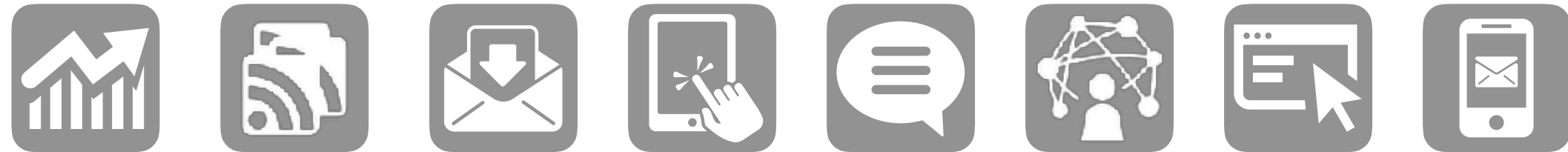
10.7. Approximately how much of your annual charitable giving goes to Best Friends?

Behavioral Marketing Defined

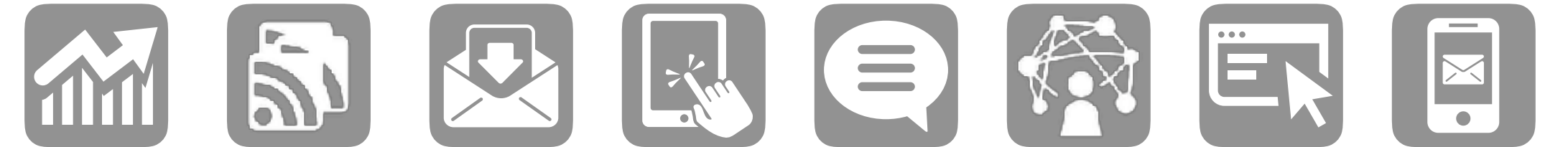
“**Behavioral Marketing** leverages known online user information and behavior in order to deliver a tailored message, offers information to that user in a timely and relevant manner.”



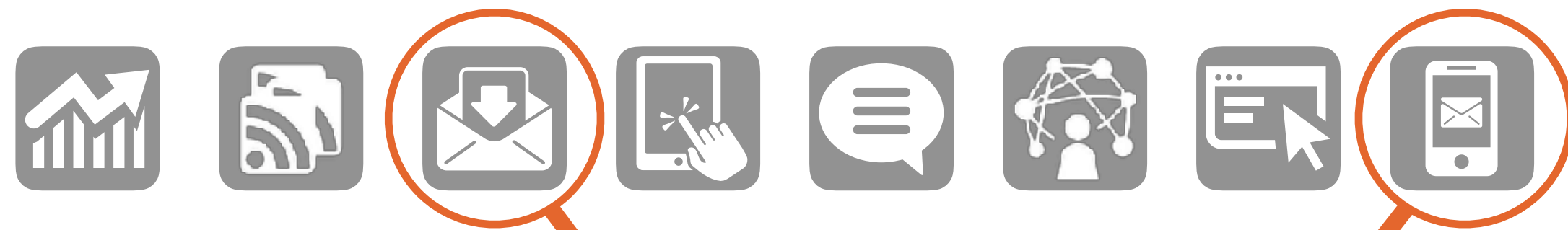
SPRAY AND PRAY



DONOR DRIVEN



SPRAY AND PRAY

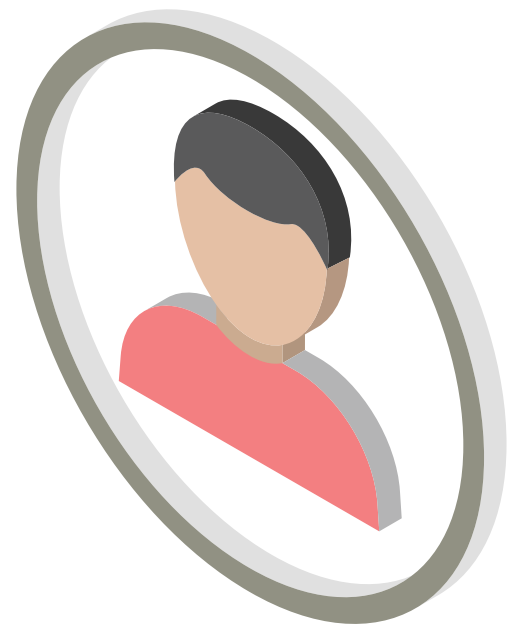


DONOR DRIVEN



Simple Use Case

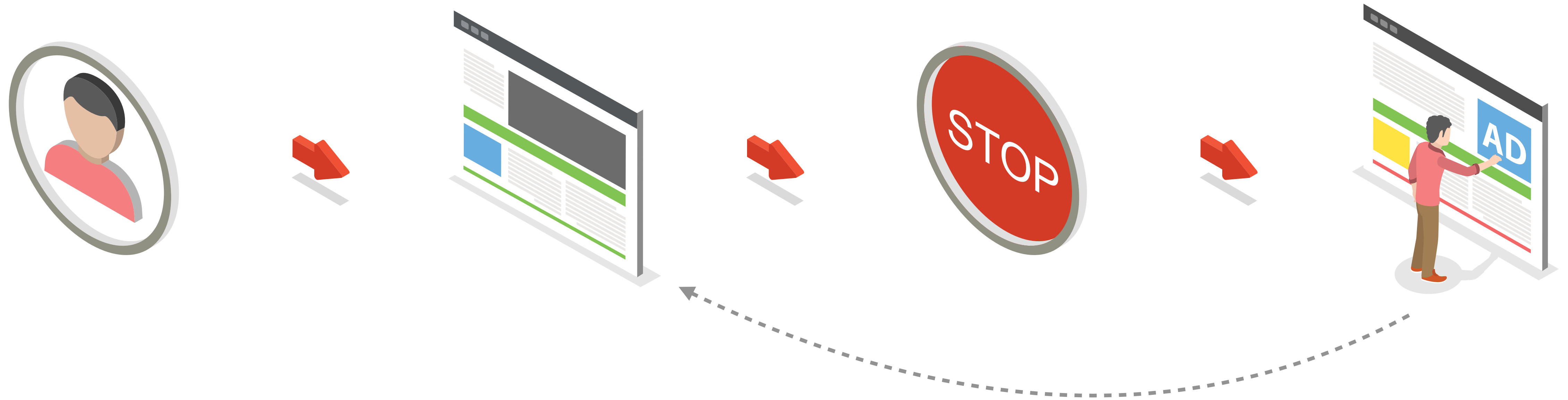
Simple Use Case



Simple Use Case







Simple Use Case



Behavioral Marketing

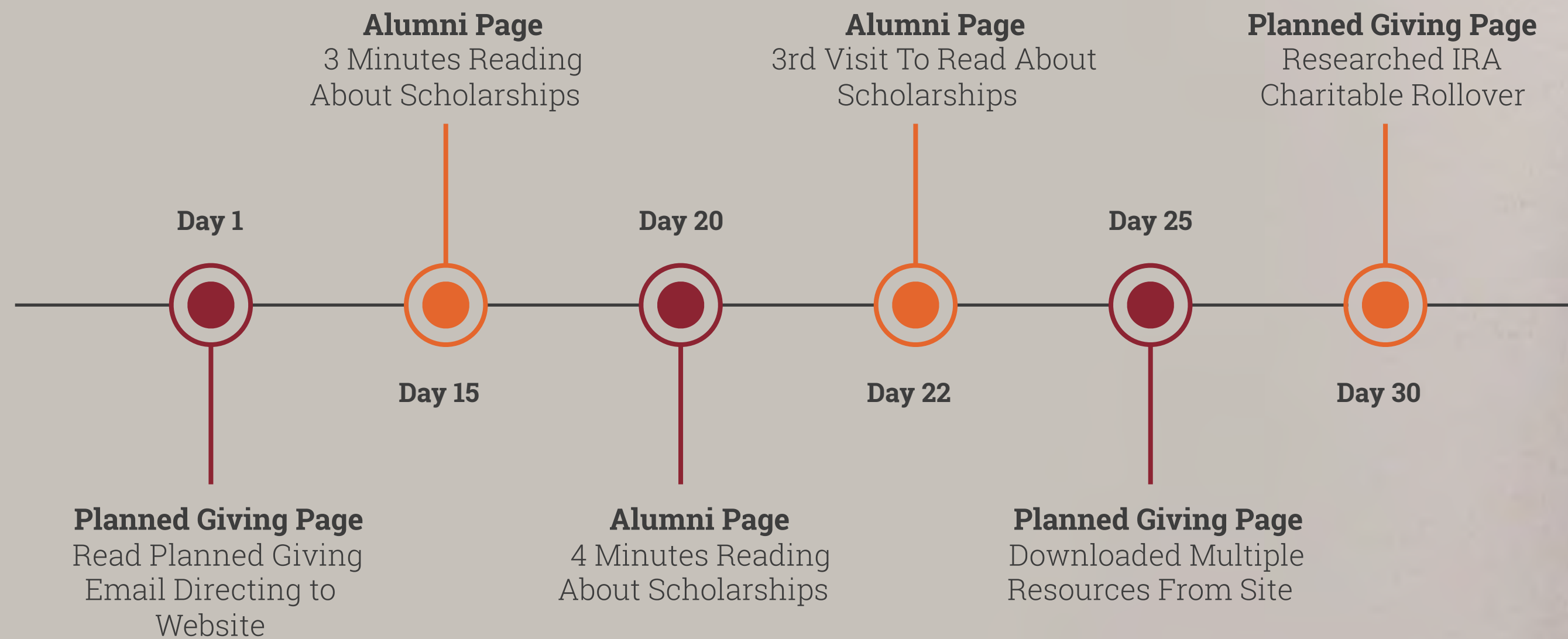
Would Amy Be On Your Planned Giving Radar?

-  **Graduated in 1990**
-  **Last Gift Date is 2013**
-  **Lifetime Giving <\$2,500**
-  **Never Assigned**



Behavioral Marketing

Never Miss a Planned Giving Opportunity Again



Behavioral Marketing

FREE Planning Tool!

Our gift to you during Estate Planning Awareness Week:

[GET MY GUIDE »](#)

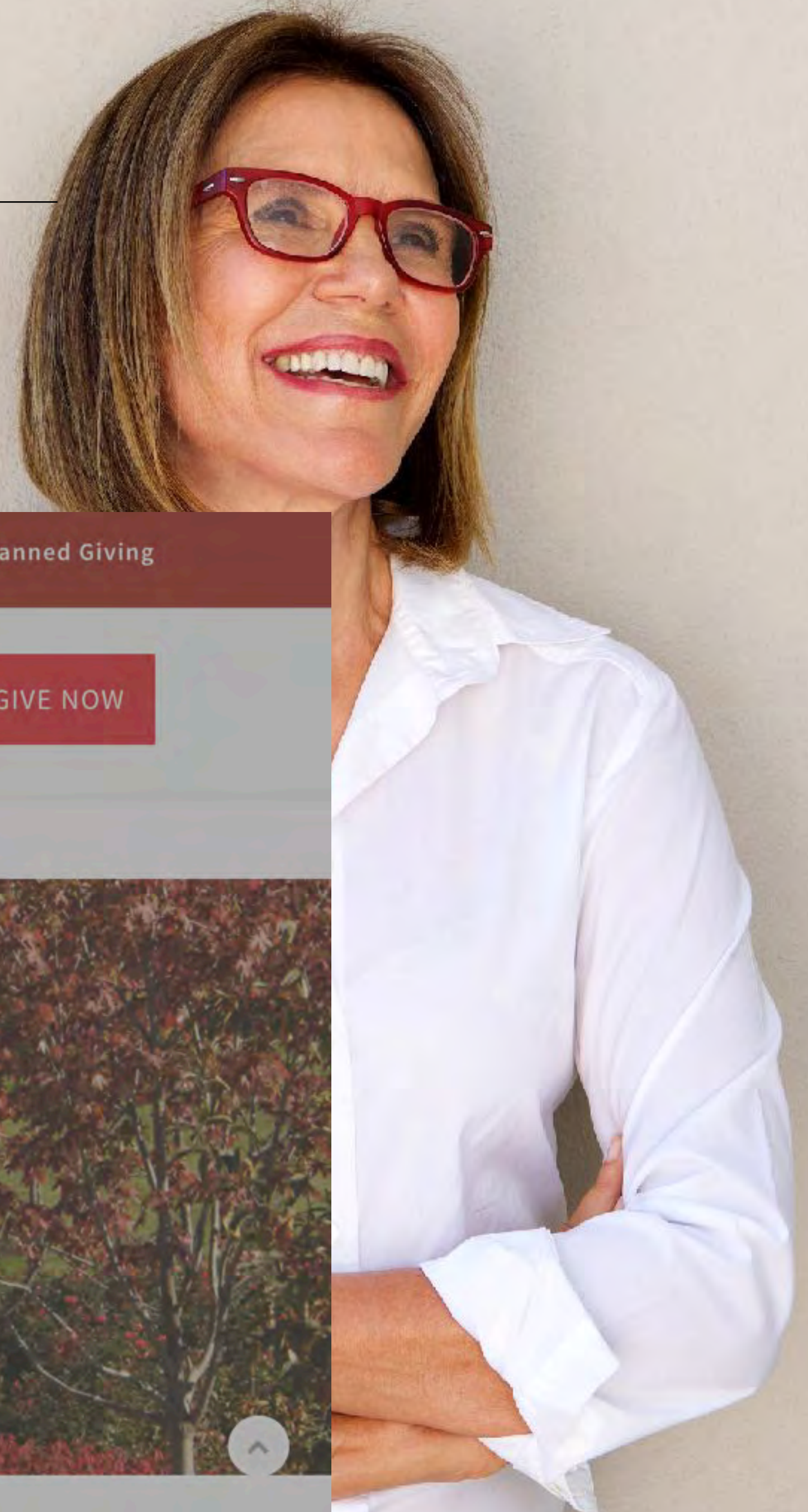
Time Is Running Out!

Make a tax-free gift from your IRA.

[SEE MY TAX BENEFITS »](#)



Behavioral Marketing



The screenshot shows the Rensselaer Giving website. The header includes the Rensselaer logo and navigation links for Donors, Corporations and Foundations, and Planned Giving. The main content area features the text 'INSTITUTE ADVANCEMENT Rensselaer Giving' and a 'GIVE NOW' button. A modal form titled 'How Can We Help?' is overlaid on the page. The form includes a list of options for estate planning assistance, a 'Last Name' field, an 'Email' field, and a 'Send' button. The background of the website shows a photograph of trees with autumn foliage.

Rensselaer

Donors | Corporations and Foundations | Planned Giving

INSTITUTE ADVANCEMENT
Rensselaer Giving

POPULAR GIFTS INCOME GIFTS SMA

GIVE NOW

How Can We Help?

We Are Pleased to Offer Estate Planning
Resources to Alumni, Friends and Parents at RPI

We would like more information on:

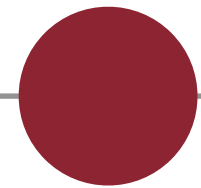
- ✓ Please Select
 - Beginning my Estate Planning Process
 - Estate Planning Strategies
 - Documenting RPI in My Estate Plans
 - General Estate Planning Assistance

Last Name:

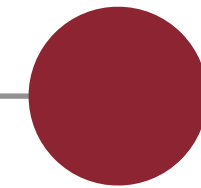
Email:

Send

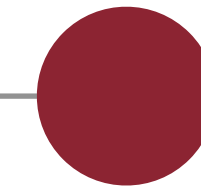
Planned Givi



**What Medium
Works for You?**



**Focus Your
Messaging**



**Be Open to New
Channels**

1

**Understand the
Change that IS
happening**

2

**The Donor
Pyramid,
Journey and
Decision
Making Process
are Changing**

3

**Understand the
Tools Available
and Look
Forward**



Questions?

Nathan Stelter

President

The Stelter Company

nathan@stelster.com

800-331-6881 / blog.stelster.com

Additional Questions?

nathan@stelster.com

jen.lennon@stelster.com

stella@stelster.com

www.stelster.com

Additional Resources

The recording and the presentation slides

www.stelter.com/webinars

Thank you!