

Getting Started in Planned Giving

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Spiritual Basis of Giving



- **Biblical Foundation on Giving**
- **Role of the Holy Spirit**
- **Role of the Ministry and Donor**

Biblical Resources

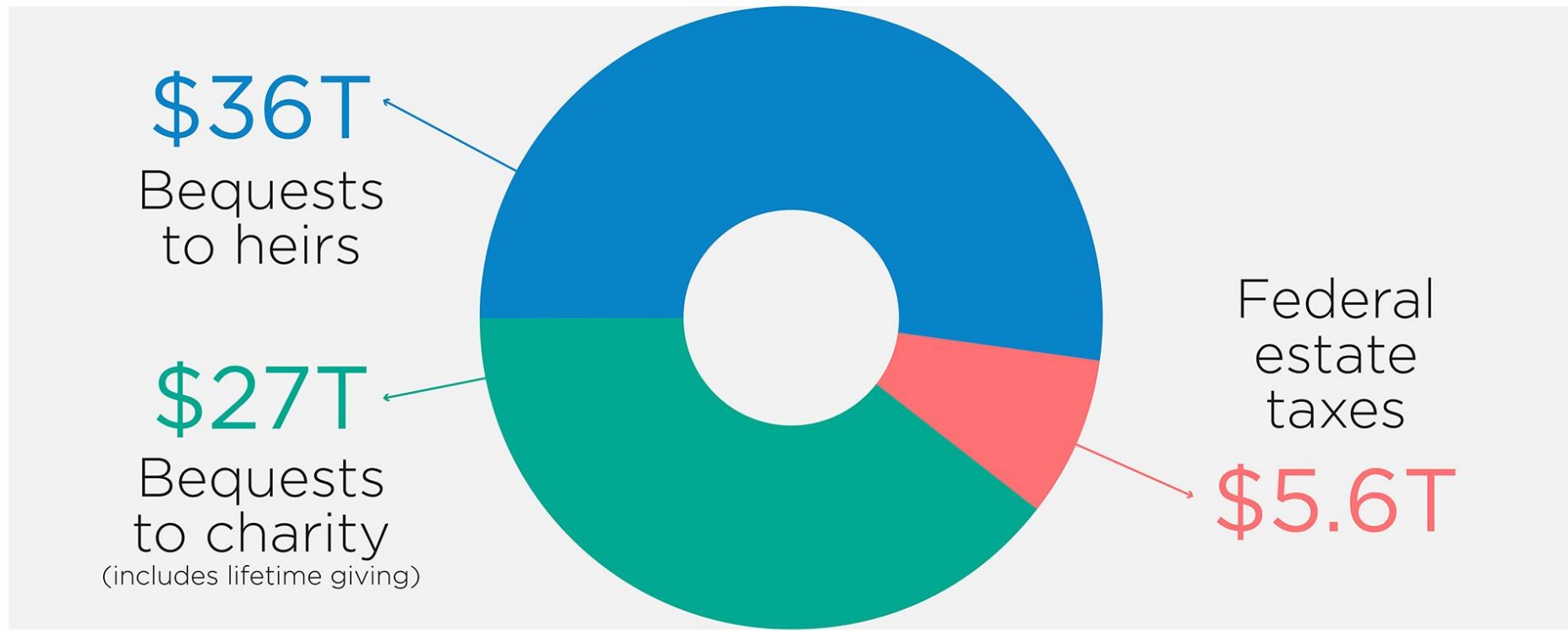
- **YouVersion Bible App**
- **Compass - Finances God's Way**
- **Generous Giving**



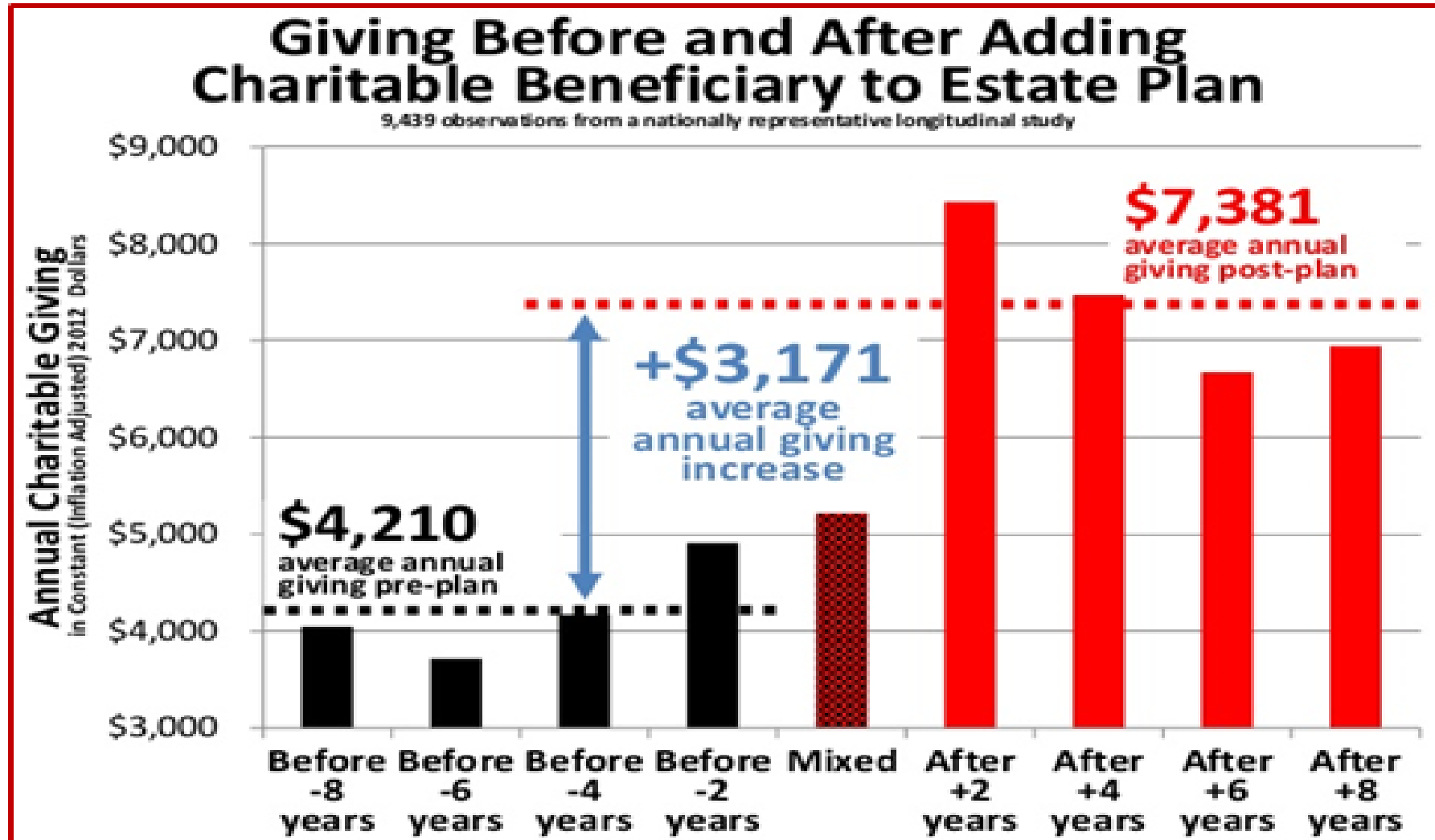
- **NIV Stewardship Bible**
- **Dr. R. Scott Rodin Books**
- **Randy Alcorn Books**
- **Ronald Blue Books**

Value of Planned and Asset Gifts to Your Organization

\$59 TRILLION Will be transferred
from Boomers to Millennial heirs, charities and taxes
between 2007 & 2061



Value of Planned and Asset Gifts to Your Organization



Value of Planned and Asset Gifts to Your Organization



- **Long-term strategy**
- **ROI - Average of 10:1**
- **Increase in Annual Giving**
- **Increased Missionary Support**
- **Greater Long-term Donor Commitment**
- **Need to steward these donors long-term**
- **Average will is \$50,000**
- **You only know 1 out of 10 will bequests**
- **Blended Gifts**

Benefits of asset and planned gifts to the donor



- Not just for the “rich folks”
- Enables donor to make a larger gift than they ever thought possible
- In many cases it will not affect their cash flow
- Potential for multiple levels of tax savings
- Legacy gift (The Ultimate Gift)

Types of Planned Gifts

Outright Asset Gifts

Qualified Charitable Distributions

Bequests/Beneficiary Designations

Donor Advised Funds

Charitable Life Income Plans

Charitable Lead Trusts

Charitable Life Estate

Other/Blended



Tools of Planned Giving Current Non-Cash Assets

Non-cash assets are where most of the wealth is held.

Cash, checking and savings accounts, money market funds, etc. make up less than **5% of Americans' wealth.**

Over **95% is held in non-cash assets** ... "beyond the checkbook."



Types of Wealth



- **Securities** -- stocks, mutual funds, bonds, etc.
- **Retirement Assets**
- **Real Estate** (Residential, Vacation, Commercial, Rental, Farm, Ranch, Mineral Rights)
- **Business Interests**
- **Life Insurance**
- **Collectables**
- **Digital Currencies/Cryptocurrencies**
- **Etc...**

Tools of Planned Giving Bequests...More Than One Way

Traditional Will or Trust Bequest

Beneficiary Designations

- Qualified retirement plans such as IRA, 403b, 401k, and so forth
- Life insurance policies and commercial annuities

Payable or Transferable On Death

- Checking, Savings or Investment accounts
- Real estate property (GODD)

Testamentary DAF



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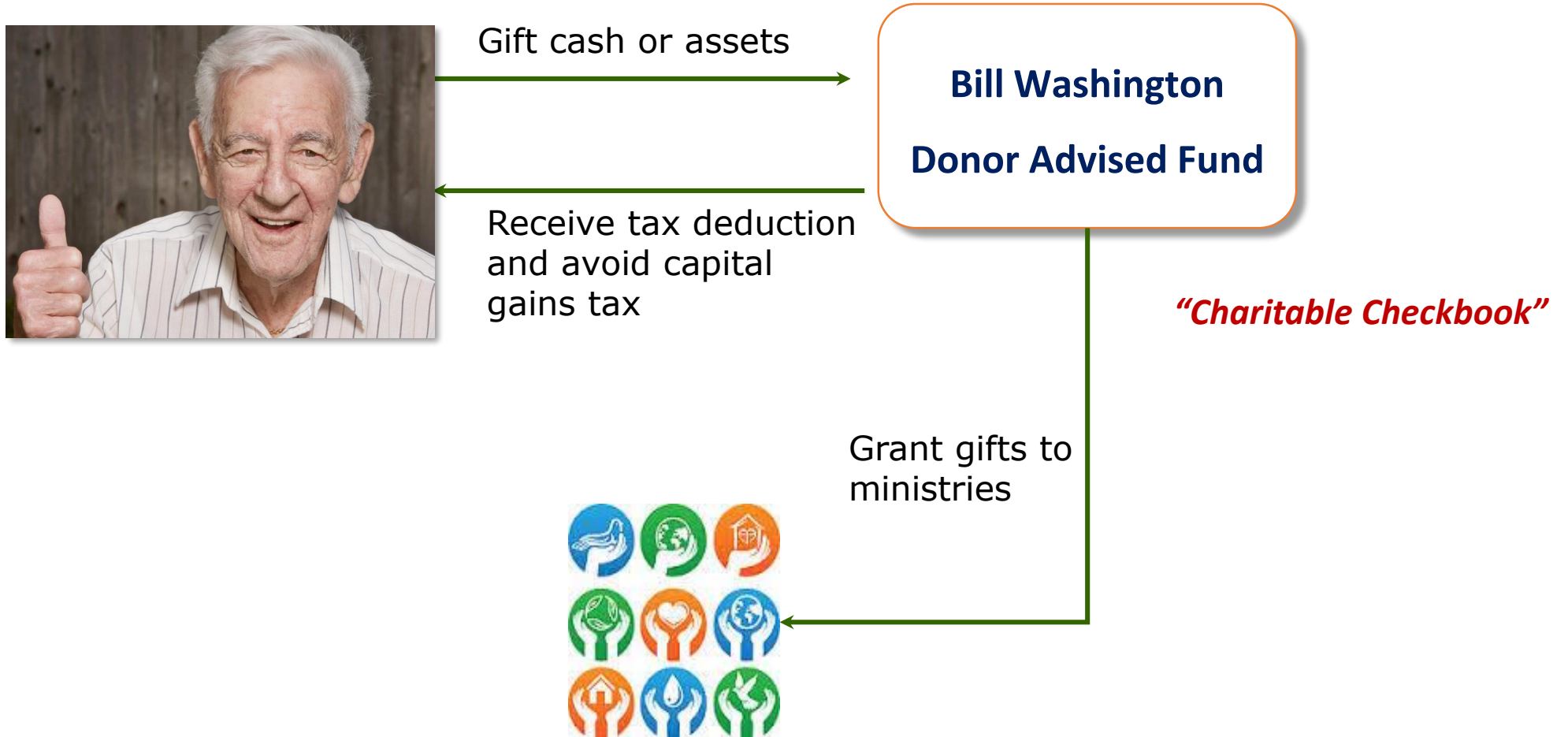
**Bequests are 80%+ of planned gifts...
good place to start**

Tools of Planned Giving IRA Qualified Charitable Distribution

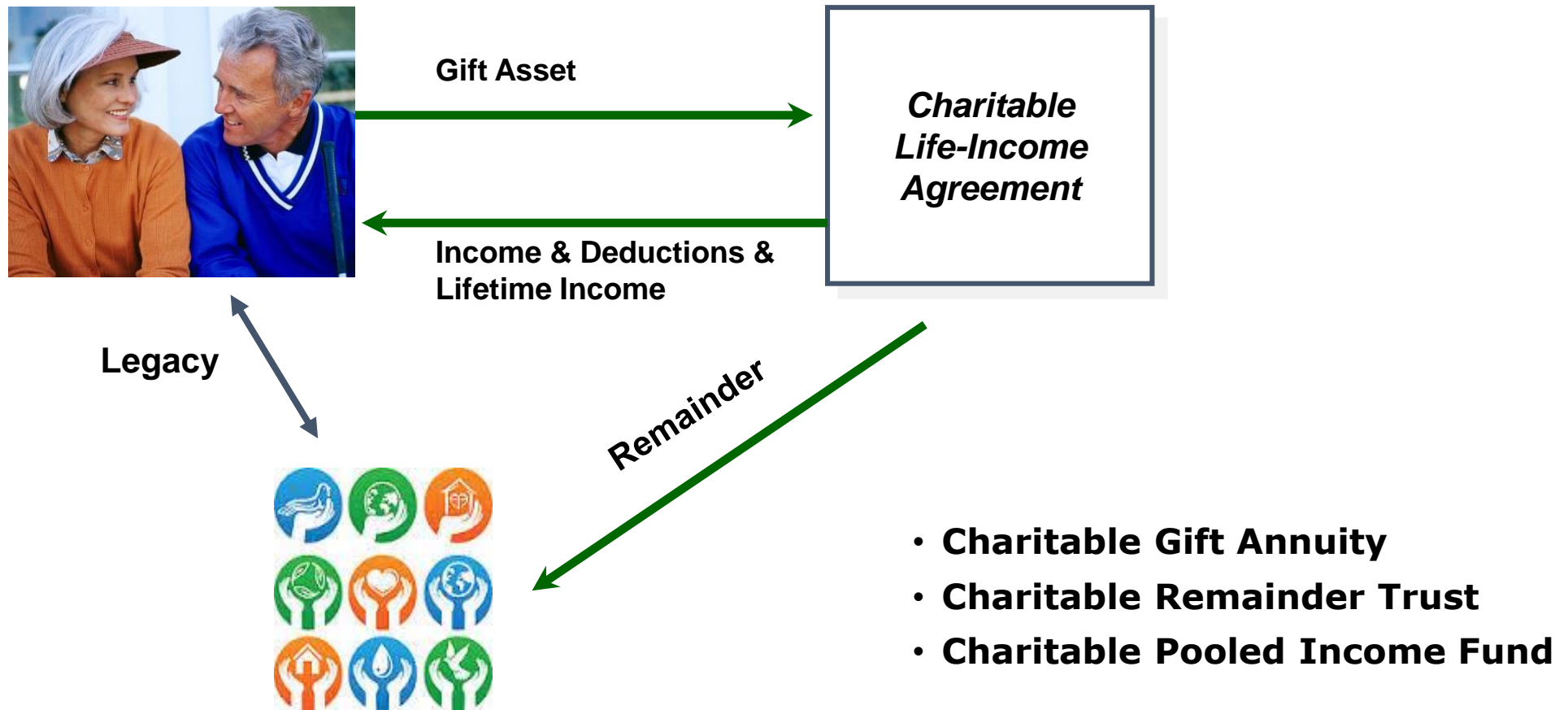


- Direct gifts from IRA account
 - “Best” way to give cash for donors age 70½ or older
 - Satisfies Required Minimum Distribution (RMD)
 - Tax Positive – excluded from taxable income
- Easy to do – just notify IRA custodian

Tools of Planned Giving Donor Advised Fund

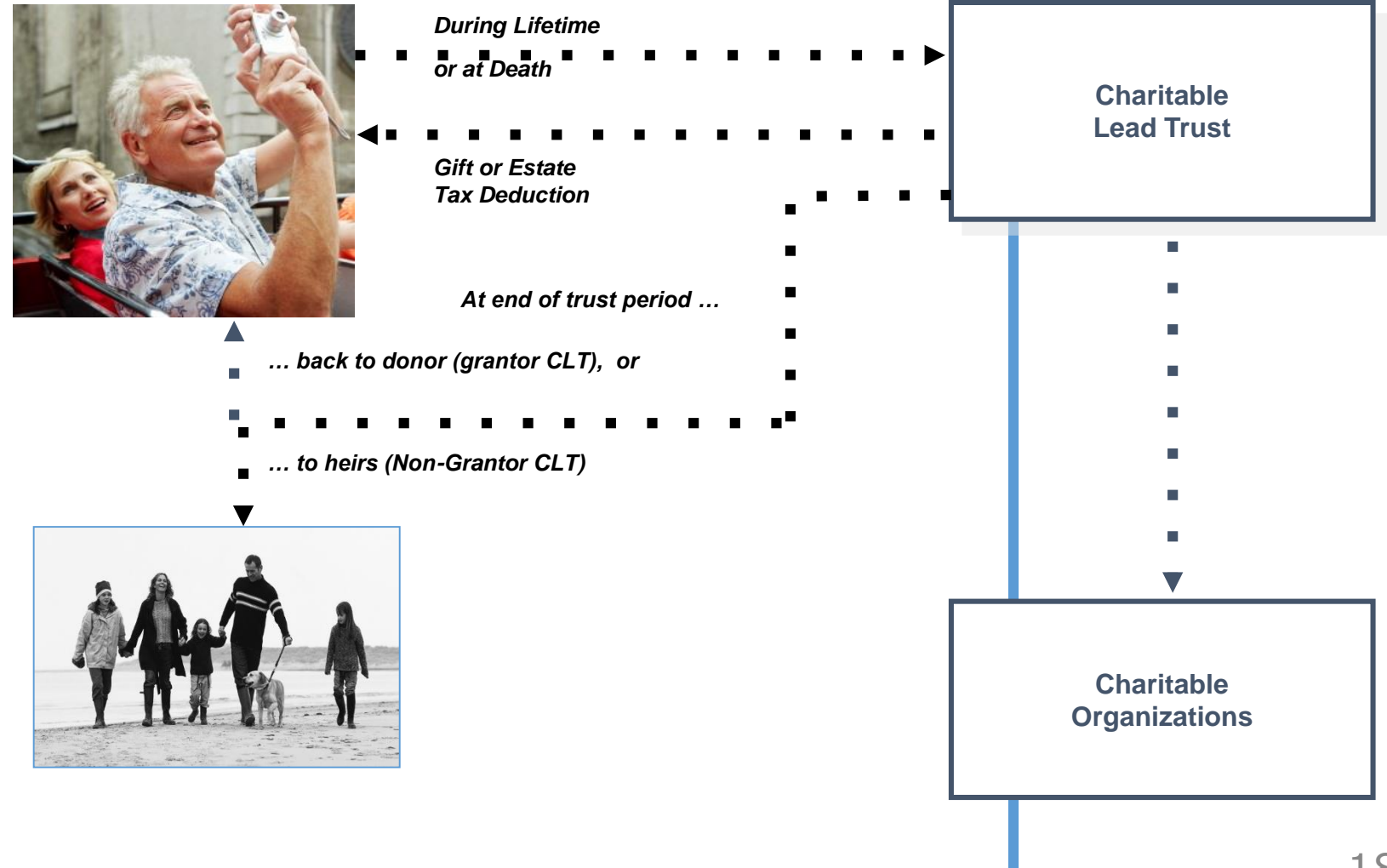


Tools of Planned Giving Charitable Life Income Plans

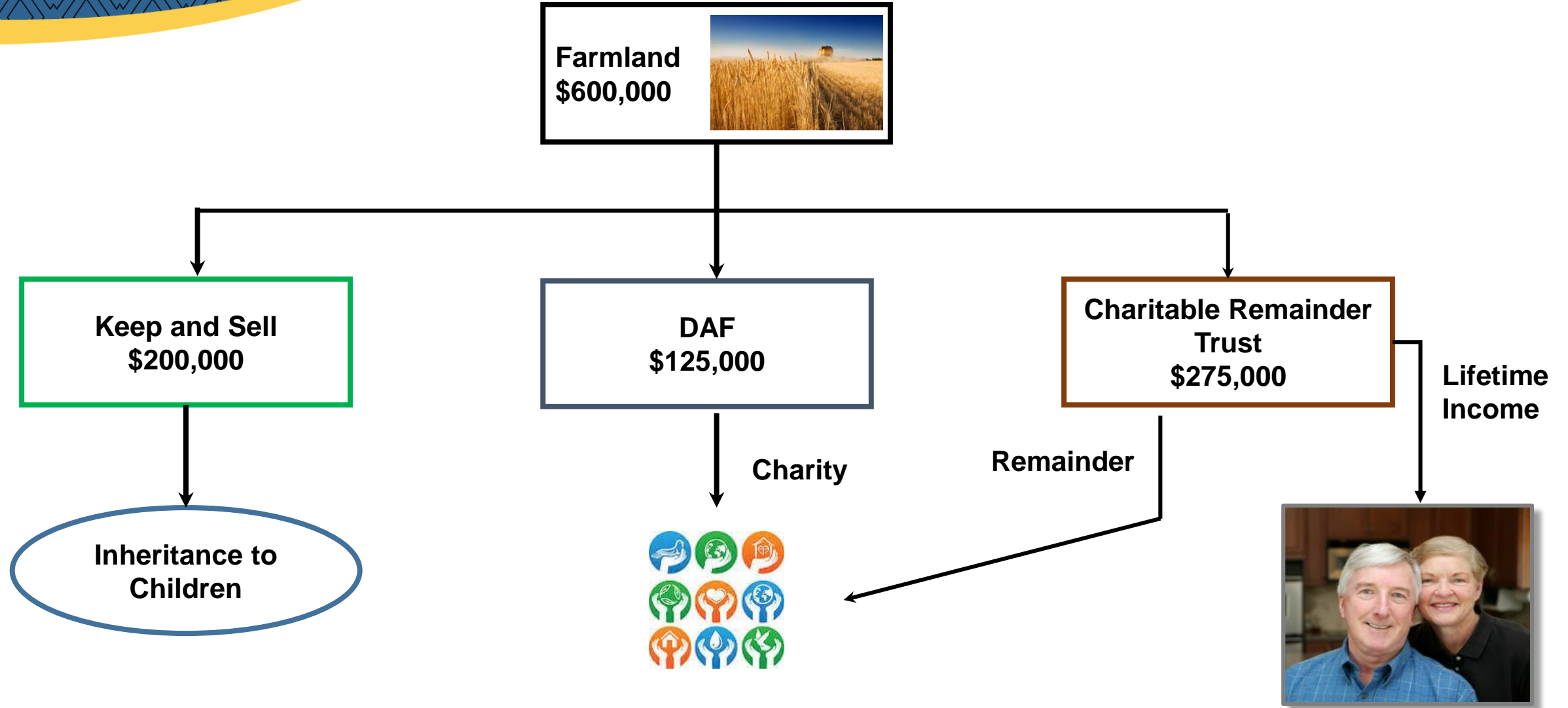


Tools of Planned Giving Charitable Lead Trusts

- **Non-Grantor**
- **Grantor**



Tools of Planned Giving Blended Gifts



Getting Started



- **Organizational Mission Vision Values Philosophy**
- **Organizational Support**
- **In-House vs. Out-Source**
- **Back Office Support**
- **Gift Acceptance Policy and Committee**
- **Budget**
- **Recognition Society**

Multi-Channel Marketing Strategies



- **Identify Constituencies**
- **Marketing Strategies & Tactics Individuals**
- **Marketing Strategies & Tactics Professionals**
- **Collaboration & Coordination with MGOs**
- **Annual Giving**
- **Start Simple**
- **Be Consistent**

Measuring Metrics

- **Marketing Responses # and %**
- **Proposals # & \$**
- **Closed Gifts #**
- **Value of Gifts \$**
- **Prospect/Donor Contacts #**
- **Personal Stewardship Touches #**
- **ROI / Cost-Benefit**



Questions

