

**WHEN YOU COMBINE
VALUES-BASED ESTATE PLANNING
CONVERSATIONS WITH DONORS, THEY GIVE MORE!**

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THOMPSON & ASSOCIATES

- Estate planning education firm
- Nonprofits hire us to work with their donors
- Free gift
- Completely confidential
- We do not sell products
- We do not solicit gifts
- We do not manage money
- Donors may bring anyone they want to the meetings

WHAT DOES THE PERFECT PLANNED GIVING PROSPECT LOOK LIKE?



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WHO ARE YOUR PERFECT PLANNED GIVING PROSPECTS?

- Those who have made **REGULAR/FREQUENT GIFTS** over time - don't worry about the amount
- Express a **BELIEF IN YOUR MISSION** - beam with pride when talking about the organization
- They have had a **POSITIVE INTERACTION** with your nonprofit – life-changing event

8 LIFE SITUATIONS GOOD DATA REVEALS

1. Singles without children
2. Couples without children
3. Singles with successful children
4. Couples with successful children
5. Individuals who are fearful to leave a large inheritance to their children
6. Individuals who believe that their children do not need a large inheritance
7. Individuals who built their wealth in unrealized income assets
8. Blended families

A STUDY OF 10 ESTATES

COMMON THEMES

- Taught to save by their parents
- Saving is still a major emphasis
- Most built their wealth with unrealized income
- 7 said they grew up poor, and 3 middle class
- 1 thought they would be wealthy
- Age 57 - average age of obtaining first \$1,000,000 of net worth
- Only 1 believed they had taught their children how to manage money
- Most believed their children spent too much and live too high
- The negative side of being wealthy – “the feeling of being hunted by friends and nonprofits”

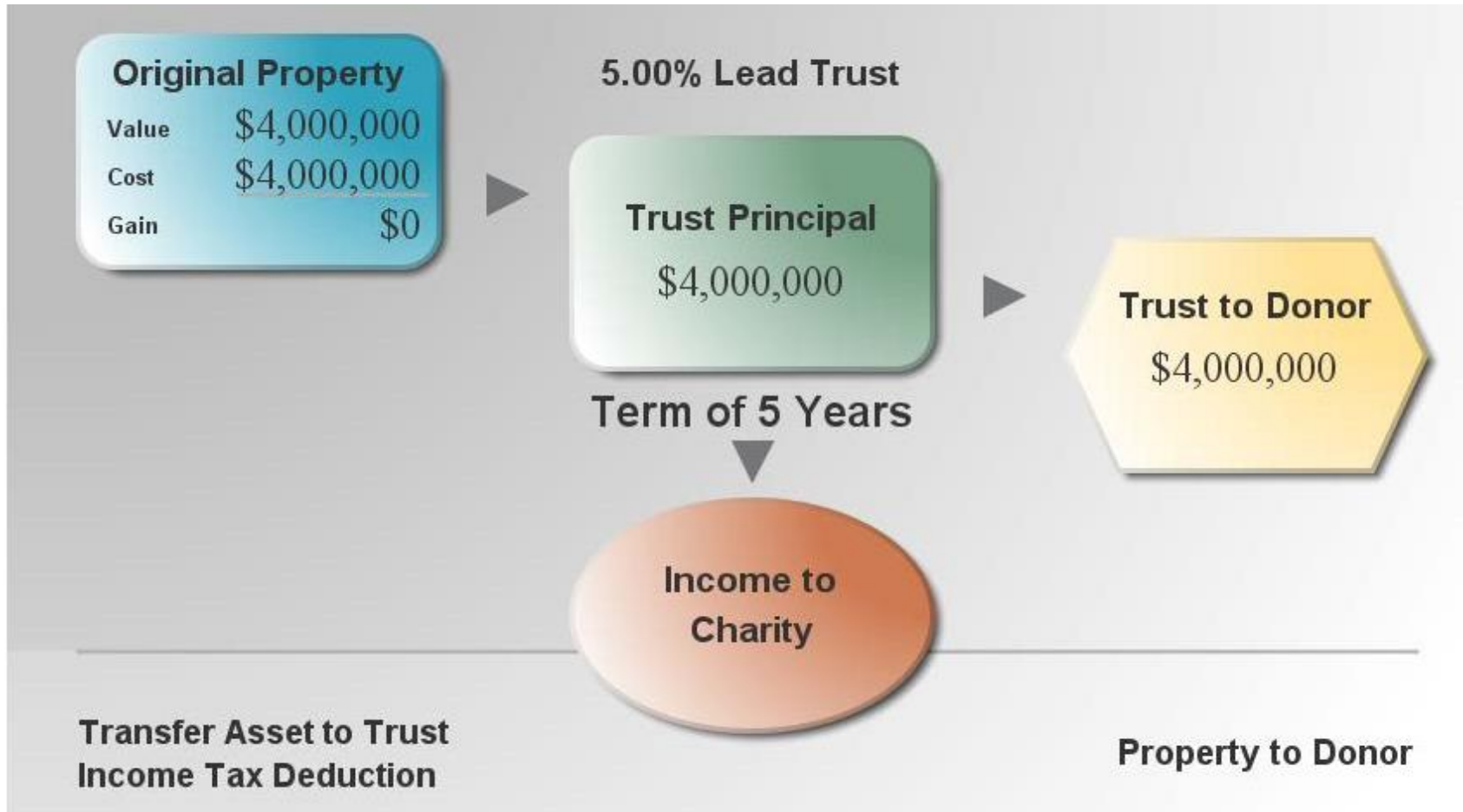
The following are real-life examples, and are shown using tax law at the time of planning.



TWO PHYSICIANS

- Couple in their early 50's
- Supported the hospital
- Just pledged \$50,000, naming opportunity
- Recently sold privately held stock
- Facing large capital gains

TWO PHYSICIANS

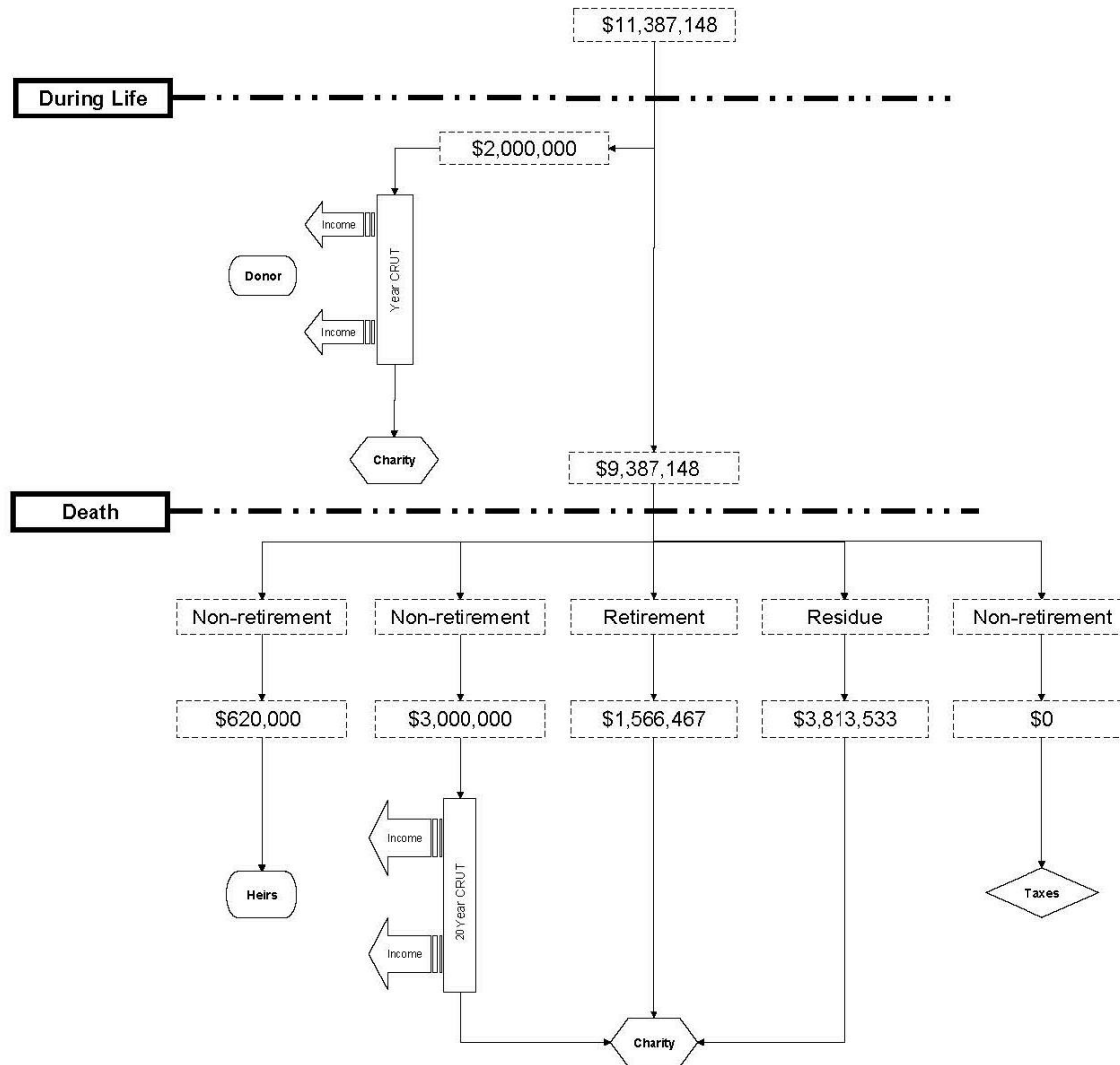




SINGLE WOMAN

- In her 60's
- Has a "boyfriend"
- Her goals were to:
 - Liquidate property
 - Provide income for him
 - Gift to N/N
 - Give to charity

SINGLE WOMAN





#3

WIDOW

- 76-year old widow
- Volunteer at the hospital
- She would visit the foundation
- Staff thought she was annoying
- Largest single gift was \$150
- Attended every event
- Her husband died at that hospital

WIDOW

#3

\$2,509,000

**\$2,199,000
to
3 Charities**

**\$310,000
to
Heirs**



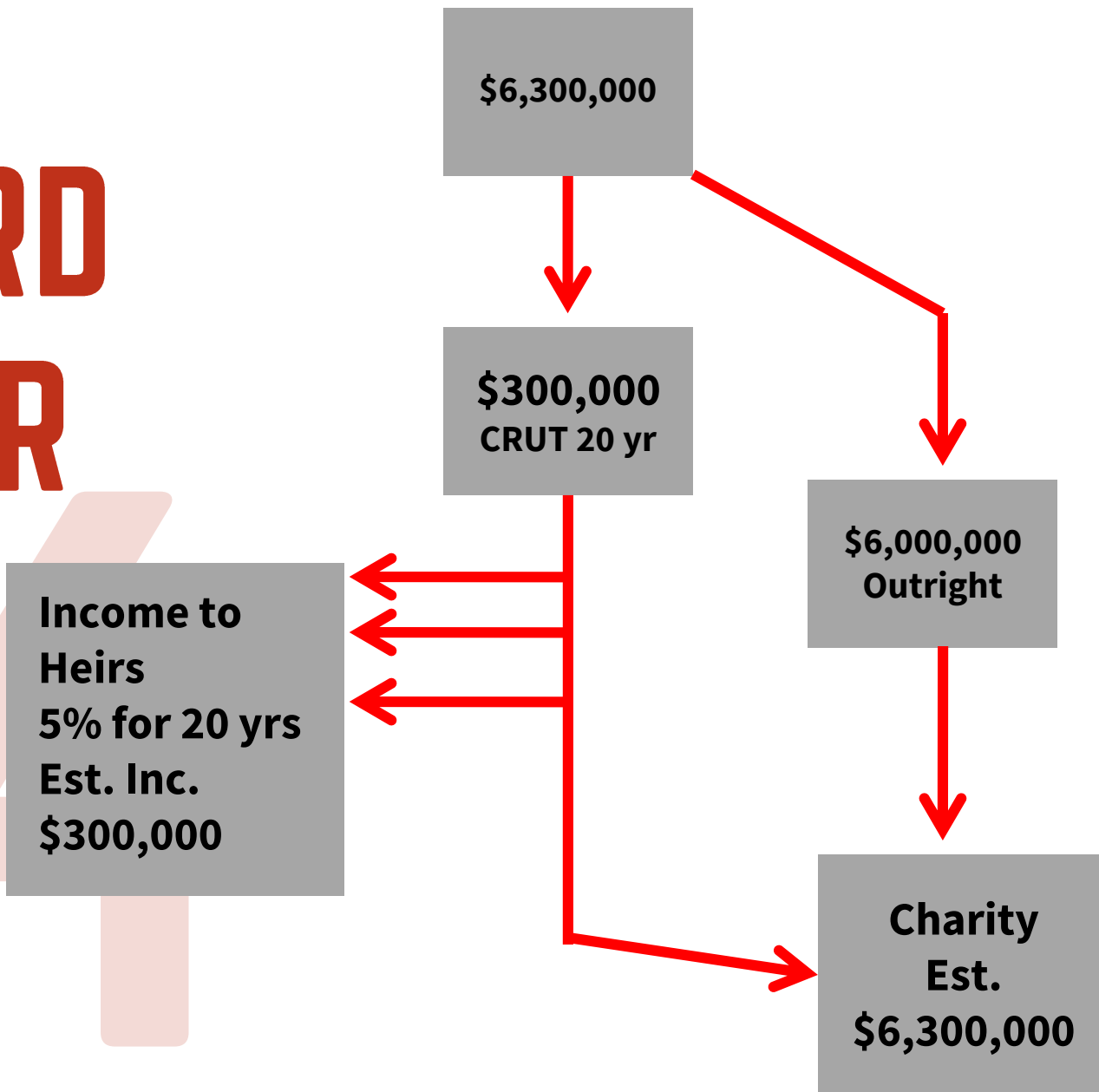


#4

BOARD CHAIR

- Couple in their late 60's
- Both are retired
- He stopped giving 2 years ago
- Staff didn't know why
- They thought it was a waste of time for him to meet with me
- He loved that hospital!
- Mom moved in 2 years ago, he was paying for her care

BOARD CHAIR





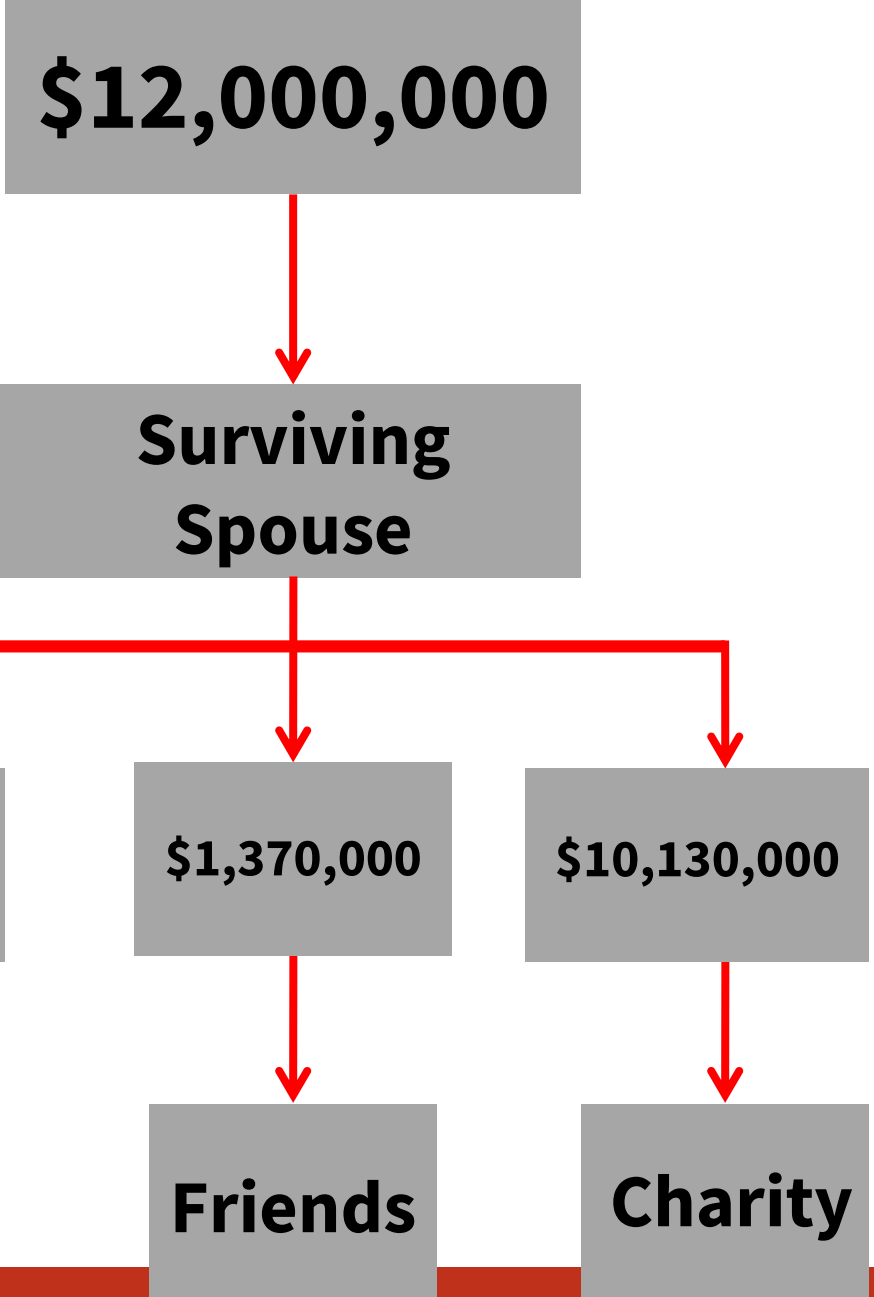
#5

TROUBLED CHILD

- Couple in their early 70's
- First marriage for him; second marriage for her
- She has one child
- She does not work outside of the home
- He runs a small, but very successful business

TROUBLED CHILD

#5



HOW DO WE IDENTIFY THAT HOT PROSPECTIVE DONOR?

- Dedicate time to face-to-face visits
- Don't solicit or talk events
- Be laser-focused on collecting data (all data)
- Pay attention to your data / analyze it



QUESTIONS



Thompson &
AssociatesSM
Values-Based Estate Planning