



Planned Giving Prompts

The samples below are intended for use in your organization's regular donor communications, whether those are formal publications or ordinary course-of-business emails. By consistent reminder of the tax advantages, relative simplicity and community impact associated with a planned gift to your organization, you are seeding the idea of a planned gift. Follow-up with the donor then becomes a predictable next step.

Prompt #1: Plan for tomorrow, today

There is no better time than NOW to think about your future. As you reflect on all you have done with your life, what legacy do you want to leave? If you do not have a will or estate plan, now is the time to create or update yours. When you do, you will find ways to:

1. Leave more for your family and the causes you support
2. Create income for you, your spouse and your family
3. Ensure you leave the charitable legacy you want

With even a simple plan, you can protect your family and leave a legacy that reflects your life's work.

Call or email us. We have tools and ideas to help you and can also connect you with experts in estate planning. It is easier and more rewarding than you might think. Plan your future, to honor your past.

Prompt #2: Supporting (ORGANIZATION NAME) Through Your Estate

Insert your organization's mission statement or a specific initiative.

Gift by Will (Bequest) - *Include specific language in your will or trust naming ORGANIZATION NAME as the beneficiary of a testamentary gift. Simply specify a specific dollar amount, a percentage of your estate or the residue of your estate.*

Beneficiary of your IRA or Retirement Plan - *Name ORGANIZATION NAME as the beneficiary of all or a portion of your retirement funds (e.g. IRA, 401(k) or 403(b) plans) to potentially reduce taxes.*

Information provided is general in nature. It is not intended to be, and should not be construed as, legal or tax advice. ORGANIZATION NAME does not provide legal or tax advice.

Prompt #3: Sample Bequest Language

The following is sample bequest language for general bequests to XXX NONPROFIT for the benefit of our mission. For language specific to a program, service or facility, please contact NAME/TITLE for assistance. Always consult your attorney before executing a new will or other estate planning document.

Specific bequests – indicates a specific amount or specific asset.

"I give [specific dollar amount or asset] to ORGANIZATION NAME to be used for UNRESTRICTED PURPOSES OR NAME OF PROGRAM."

Residuary bequest – indicates ORGANIZATION NAME will receive all or a percentage of the remainder of the estate after specific bequests have been fulfilled.

“I give [___%] or [the remainder] of my residual estate to ORGANIZATION NAME to be used for UNRESTRICTED PURPOSES OR NAME OF PROGRAM.”

Contingent bequest – comes into effect if primary beneficiaries named in the will predecease you.

“If [name of beneficiary] predeceases me, I give such property to ORGANIZATION NAME to be used for UNRESTRICTED PURPOSES OR NAME OF PROGRAM.”

Please contact NAME/TITLE/CONTACT, if you or your attorney have any questions or would like to discuss your specific planned gift.

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Prompt #4: Gift Planning 101

Gift Planning – also known as “deferred giving” or “planned giving” – is the process of planning and defining a gift during your lifetime that will take effect after your passing. Just as you can bequeath your assets to family and friends, you may also name a nonprofit, such as ORGANIZATION NAME, as a beneficiary.

Philanthropy serves an important role in fulfilling ORGANIZATION NAME’s vision for the future of MISSION. A variety of options are available for you to plan for tomorrow, *today*. ORGANIZATION NAME can help you establish your unique legacy gift to SHORT MISSION. *For more information, please contact NAME/CONTACT INFO.*

Prompt #5: 3 Steps to Making a Beneficiary Gift

A beneficiary designation is a simple and affordable way to make a legacy gift. You can designate any one of ORGANIZATION NAME’s programs, services or facilities as a beneficiary of a retirement, investment or bank account, or even a life insurance policy. With a beneficiary designation in place, you continue to use your account as needed, simplify your planning, avoid the cost of revising your will or trust, and support the ORGANIZATION NAME services you care about most!

It is as Easy as 1, 2, 3!

1. Request a “change of beneficiary” form from your plan administrator.
2. List ORGANIZATION NAME as beneficiary, with address, phone and tax ID.
3. Inform us of your intentions so we can thank you!

If you plan to leave a legacy gift to ORGANIZATION NAME in your estate plan, please keep in mind that beneficiary designation gifts are among the most flexible of all charitable gifts. Even after you complete the beneficiary designation form, you can take distributions or withdrawals from the account as usual.

Prompt #6: What is Planned Giving?

Simply put, “planned giving” is the transfer of assets to a designated nonprofit organization, for example any of the number of programs, services or facilities of ORGANIZATION NAME, during a lifetime or as part of an estate plan. This forward-thinking approach to giving is “planned” because often these assets are not liquid, have tax consequences and are generally transferred via a will or other written means.

It can involve assets you might never think of.

Retirement assets. A life insurance policy. Real estate. Stock accounts. Business holdings. A checking or savings account. These are all assets that can be leveraged in planned gifts.

It can work in tandem with other family priorities.

Planned giving is not an “all or nothing” option. Gifts can exist side-by-side with other beneficiaries and personal priorities.

Leave a lasting impact.

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Prompt #7: Planned Giving Vehicles and Legacy Society

Live your core values and make them known by supporting ORGANIZATION NAME with a planned gift. Members of our legacy society are generous and forward-thinking donors who will support our long-term success and be long remembered.

In addition to supporting our work through your generous cash donations, here are other ways you can contribute to the sustainability of SHORT MISSION in the long term. Many of these options are a win-win for the donor and the organization. We encourage you to consult with your financial advisor to discuss the tax implications of these options.

Bequests

One of the easiest ways to help involves simply naming ORGANIZATION NAME as a beneficiary in your will and living trust. A bequest may be for a particular dollar amount or percentage of your estate. Estate tax savings may be significant.

Retirement Assets or Life Insurance Policy

Often overlooked by donors, naming ORGANIZATION NAME as a partial beneficiary of these assets can provide support for the organization.

Complex Gifts

If you are a business owner, own real property or a business interest, giving options exist that can both help ORGANIZATION NAME and benefit your family financially.

Legacy society members become a special part of the ORGANIZATION NAME donor family. They are honored with:

- Recognition on our website
- Tributes in ORGANIZATION NAME publications
- Invitation to ORGANIZATION NAME annual SOCIETY NAME luncheon

Contact NAME/CONTACT INFO to discuss membership in the LEGACY SOCIETY NAME.