



OKLAHOMA CITY
COMMUNITY FOUNDATION

Planned Giving:

Running a Program With Limited Staff

Joe Carter, Director of Planned Giving

Organizational Goals

- Organizational stability.
- Program enhancement.
- Donor stewardship.
- Professional advisor outreach.

Defining Community Impact

- Why a planned gift?
- Define charitable impact on community.
- What is the value of your organization?
- Identify impact donors.
- Involve local nonprofits.

Planned Giving Options

- Donor advised funds.
- Supporting organizations.
- Scholarship funds.
- Charitable organization endowment funds.

Planned Giving Vehicles

- Charitable remainder trusts.
- Charitable gift annuities.
- Charitable lead trusts.
- Retained life estate gifts.
- Pooled income funds.

Management Plan

- Who is responsible for the plan?
- Who do they report to?
- Who will track the gifts, documents and record?
- Who will be responsible for stewardship and relationship building?

Administration Requirement Considerations

Outsource?

- Gifts of tangled property.
Example: Charitable Solutions, LLC
- Tax filing.
- Investment options.
- Charitable gift annuities administration.
Example: Kaspick & Associates

Where to Begin

- 60.5% consult an advisor.
- 28% used a charitable vehicle (a 23.8% increase over 2012).
- 55.6% plan to establish a charitable vehicle.
- 43.4% planned to make a provision in their estate for charity.
- 15.7% use or plan to use a DAF.

Where to Begin

- 7.6% use or plan to use a private foundation.
- 3.9% use or plan to use a CGA, CRT or CLT.
- 49.7% of nonprofits followed by 45.5% of financial advisors were most asked by clients about charitable giving. That was a 29% increase over 2012 for financial advisors. All other professionals fell sharply.
- 37.9% of high net worth women were interested in learning more about charitable giving tools.

Position Yourself as a Resource Center

- Crescendo Interactive.
- Planned Giving Design Center.
- PG Calc.
- VirtualGiving.com.

Building an Advisor Network

Offer continuing education courses.

- Cannon Financial Teleconference.
- Local Estate Planning Councils.
- Local Planned Giving Councils.
- In-house Seminars.
- Lunch and Learns.

Partner with American Funds.

Establish an Advisory Council.

Marketing and Communications

- Crescendo Interactive.
- Planned Giving Marketing Solutions.
- PG Calc.
- The Stetler Company.
- PlannedGiving.com.

Concentrate on Simple Gifts

- Bequests.
- Charitable gift annuities.

Don't Over Indulge

- Buying birthdate lists.
- Accounting firms.
- Complex gifts.



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Thank you for attending.

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