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Planned Giving Marketing - Insights, Ideas and Practical Tips

Brynn Blanchard, CFRE, Chief Advancement Officer, Seattle Humane

Vicki Brummond, MBA, Director of Marketing & Communications, Tacoma Rescue Mission

Sandra Dolese, CFRE, Planned Giving Officer, The Museum of Flight

Jeremy Stelter, Executive Vice President, The Stelter Company

Sarah Valentine, CFRE, Vice President of Development, Woodland Park Zoo



Seattle
Humane



- Established in 1897
- 21,500 donors, 445 planned estates
- Estate planning program launched in 2009 with 50 planned estates
- From January 2009-2018, 172 planned gifts received (104 estates from previous donors)
- Median planned gift= \$63,178
- Annual budget= \$10 million
- Staffing: 50% of Major and Planned Giving Director, Chief Advancement Officer portfolio
- Brynn Blanchard, CFRE
 - Chief Advancement Officer
 - Started in November 2008





Tacoma Rescue Mission

HELP • HOPE • HEALING

Offering God's help, hope & healing
to the most impoverished members
of our community since 1912

- Began 107 years ago
- **FY 2018-2019: Operating budget: \$6.7 million**
 - Fundraising from individuals \$3.4 million
- **9,116 Active donors**
 - Average bequest (over past 3 years): \$37,591 – *without dedicated program / marketing*
- **Currently: 2 dedicated major gift officers**
- **Slated to start a Planned Giving Program in 2020**



Vicki Brummond, MBA
Director of Marketing & Communications
since 2019

Previously directed & managed
Planned Giving Marketing at World Vision for 16+ years





- The Museum of Flight began 53 years ago
- 2019 operating budget is \$24.5M / fundraising is \$7.5M
 - Budget has increased 110% in 9 years
- 16,000 members / 2,500 donors / 95 legacy donors
- Average (median) planned gifts is \$65,000
- Planned giving staff = one person also raising major gifts
 - 75% / 25%
- Sandie Dolese, CFRE, CSPG
 - Major Gifts & Planned Giving
 - The Museum of Flight since 2008



- Woodland Park Zoo was established in 1899
- 2019 operating budget is \$44.1M / fundraising is \$10.9M
 - Endowment is \$20.1M
- 36,000 members / 5,400 donors / 166 legacy donors
- Average (median) planned gift is \$247,073
- Planned giving staff = 20% one director and 10% VP; recruiting fundraisers for major and planned giving
- Sarah K. Valentine, CFRE
 - Vice President of Development



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Why should I start a PG program?

2

How do I start a PG marketing program?

3

Who is our Audience?

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What do I say?

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How? Tactics

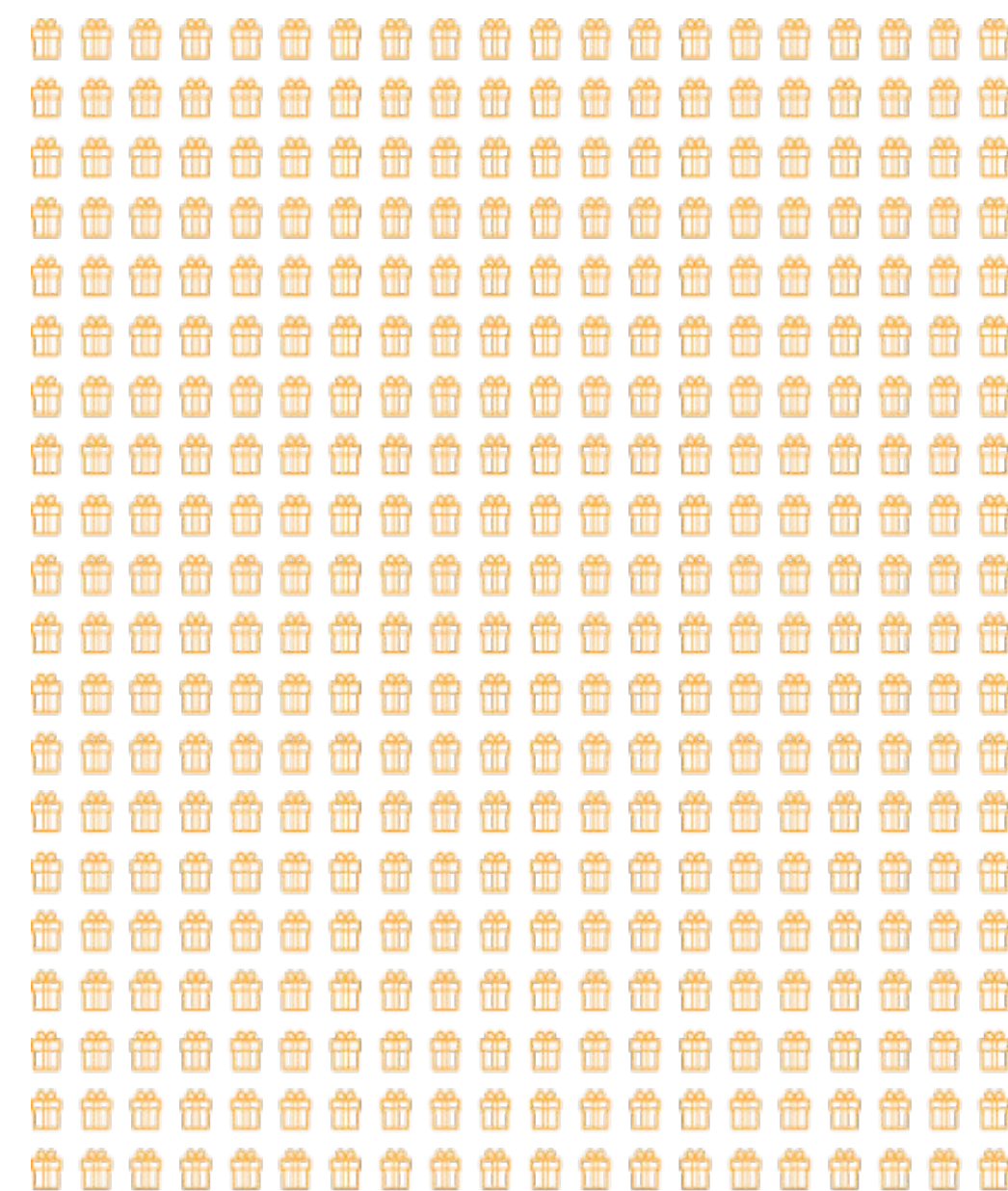
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Trends/Ideas

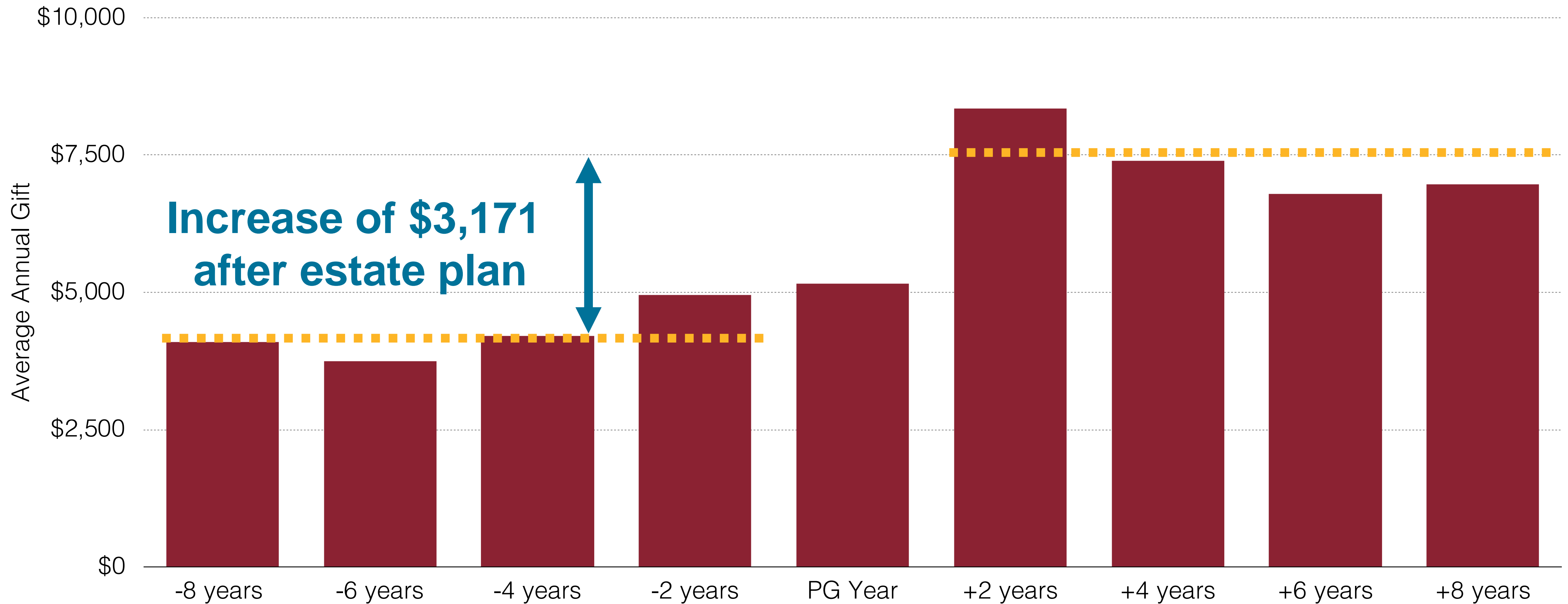
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**Why should I start a
start a PG program?**

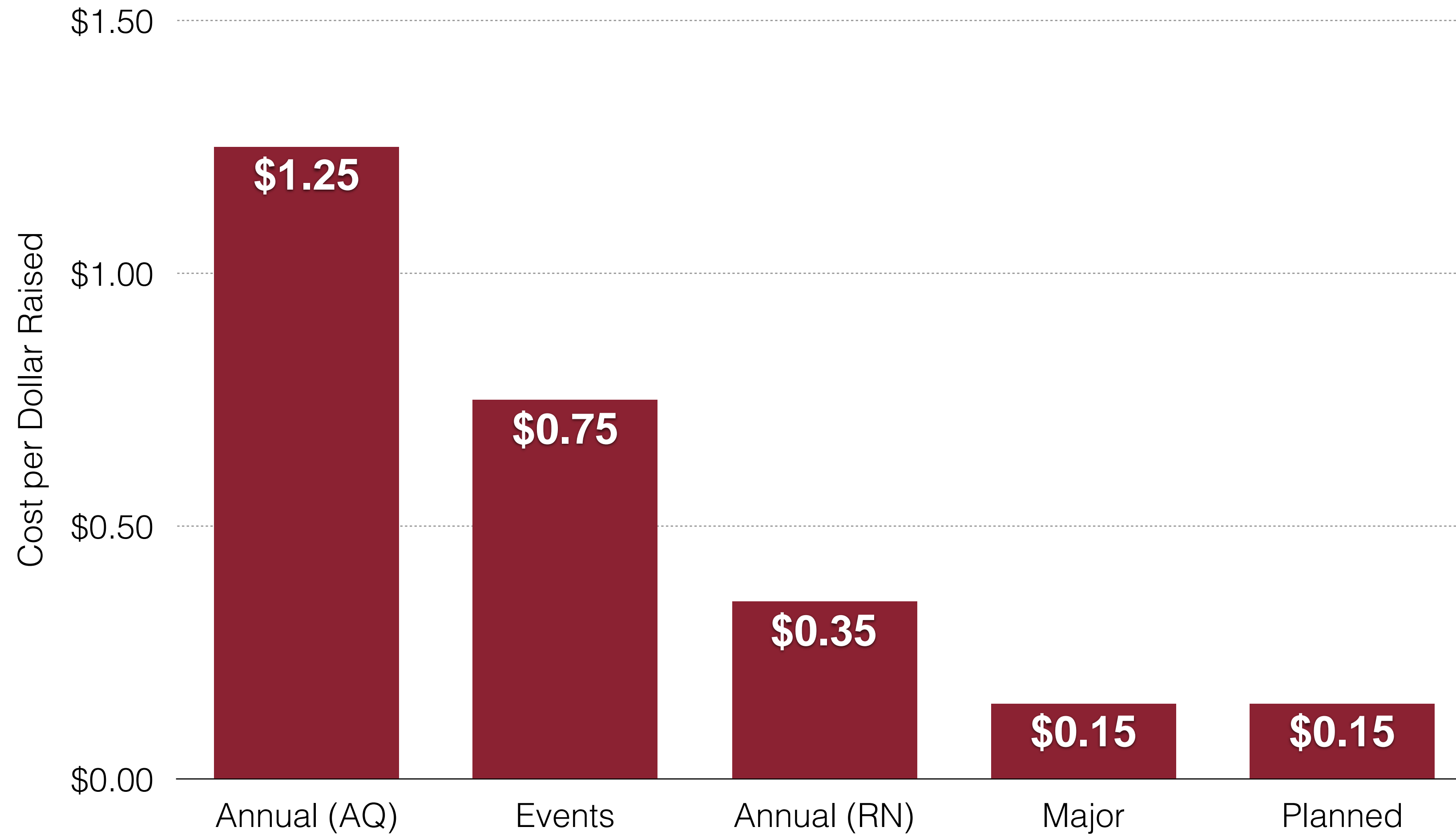
The Typical Planned Gift is Roughly Equivalent to 100 Annual Gifts



PG Impact on Annual Giving



Cost Per Dollar Raised



5-year average growth in total fundraising (2010 to 2015)

NONPROFITS
receiving
ONLY
CASH
gifts

2,548 nonprofits raising \$1MM+ in 2010 reported only cash gifts in 2010 & 2015 on e-file IRS-990

11%
GROWTH

NONPROFITS
receiving
ANY
NONCASH
gifts

4,236 nonprofits raising \$1MM+ in 2010 reported noncash gifts in 2010 & 2015 on e-file IRS-990

50%
GROWTH

NONPROFITS
receiving
SECURITIES
NONCASH
gifts

2,143 nonprofits raising \$1MM+ in 2010 reported securities gifts in 2010 & 2015 on e-file IRS-990

66%
GROWTH

Original Wealth Transfer Projections

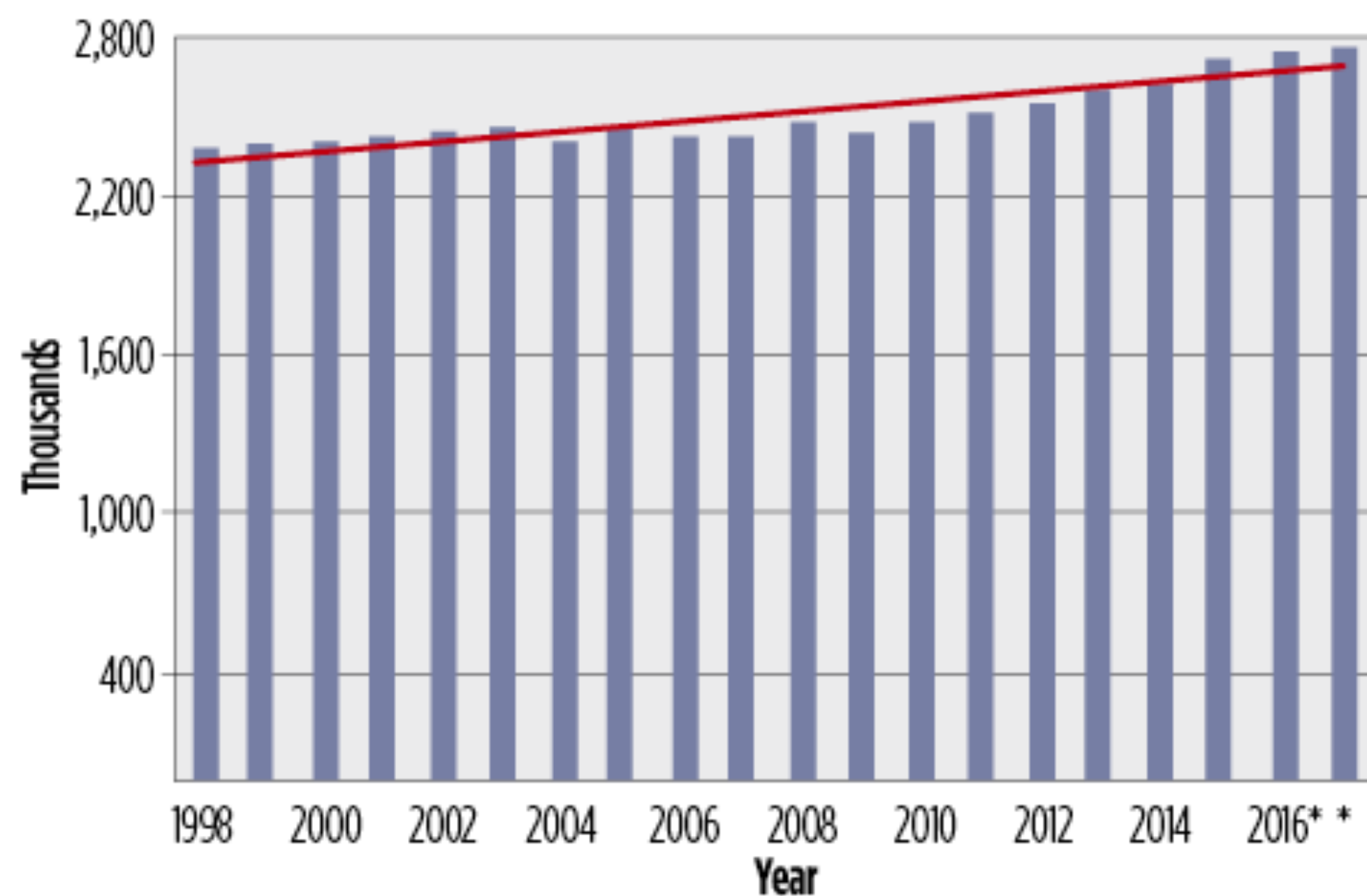
**U.S. Wealth Transfer of \$59 Trillion,
With \$6.3 Trillion in Charitable
Bequests, from 2007-2061**

Total gifts to charity during the study
period estimates that
lifetime giving will yield an additional
\$20.6 trillion for charity from 2007-2061

The Boom is In Sight!

Death Rate **Increases**

Baby Boomers' mortality will fuel increases in transfer of wealth



* Estimate

— U.S. Census Bureau

Why should I start a PG program?

Key Takeaways

- Average PG= \$60k
- Impact on Annual giving program
- Growth of non-cash gifts
- Wealth transfer



2

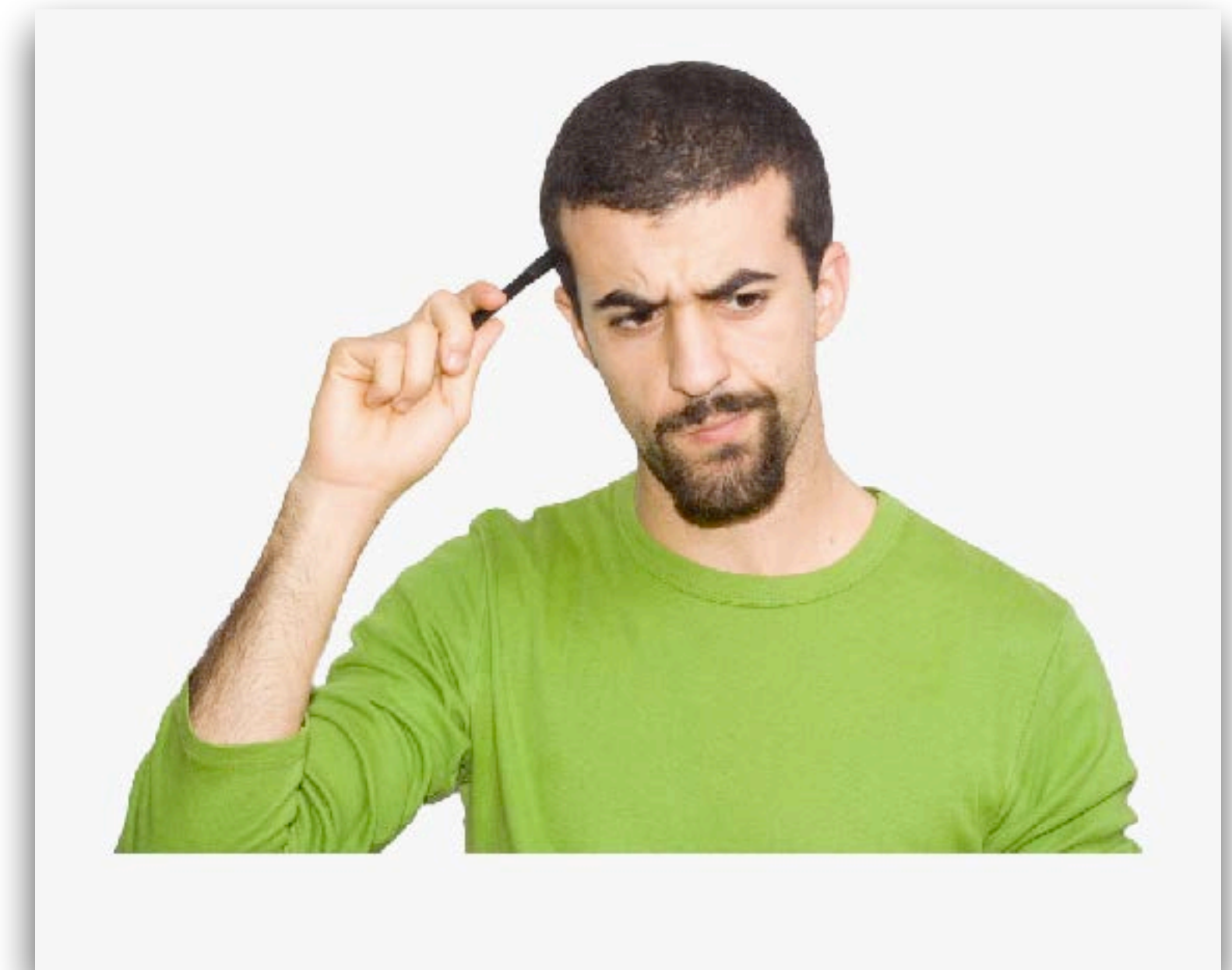
**How do I start a PG
marketing program?**

The planning and execution of direct marketing should focus on building long-term connections with donors

How do I start a PG marketing program?

Key Takeaways

- Build internal support
- Set up policies & procedures
- Develop and train staff
- Cultivate & secure board and management buy-in
- Leverage Planned Giving successes
- Develop a plan with a case statement and a budget
- Create copy and minimal collateral



3

Who is our Audience?

Demographic Shift

- Planned Giving largely grown on the back of the Great & Silent Generations
- Boomers think differently, act differently
- Younger generations are great prospects



Matures (Born 1925-1945)

- » Comprise 5% of the US adult population
- » Children of the 1940s and 50's
- » Belief in top-down leadership
- » Respect for experience
- » Neat and conservative dress and appearance



Boomers (Born 1946-1964)

Children of the 1960s and 70's

Challenge the status quo:

- » Political unrest, Civil rights, Sexual revolution
- » "Never trust anyone over 30"
- » Explosion of Television and broader 'access' to information
- » 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)

Younger donors are great prospects

- » The best prospects for future gifts are decidedly young. A full 6 percent of best prospects are ages 40 to 54, while only 10 percent of people aged 70 and older meet the criteria

	Age 40–49	Age 50–59	Age 60–69	Age 70+
Current Planned Givers	21%	26%	27%	26%
Best Prospects	40%	32%	18%	10%

Importance/Prevalence of Estate Planning Documents



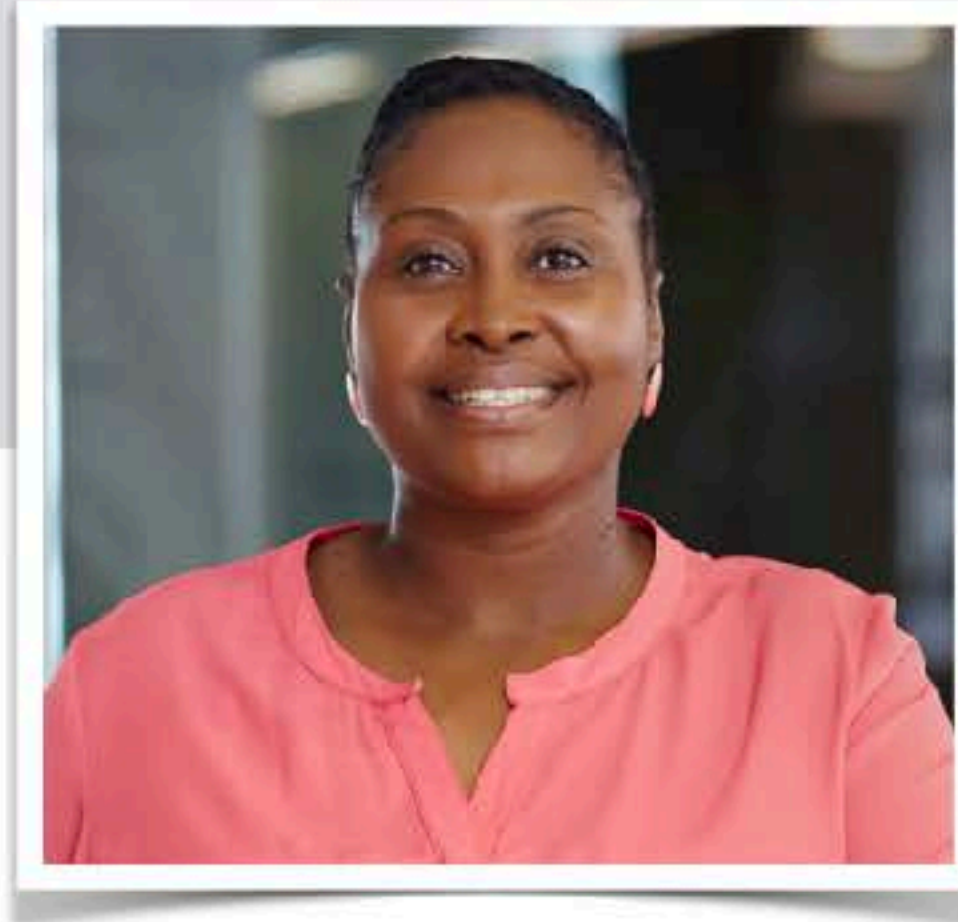
Millennials

Ages 19-39

33% Very Important

18% Have a Will

52% Have None



Gen X

Ages 40-51

42% Very Important

28% Have a Will

43% Have None



Boomers

Ages 52-70

49% Very Important

44% Have a Will

29% Have None



Matures

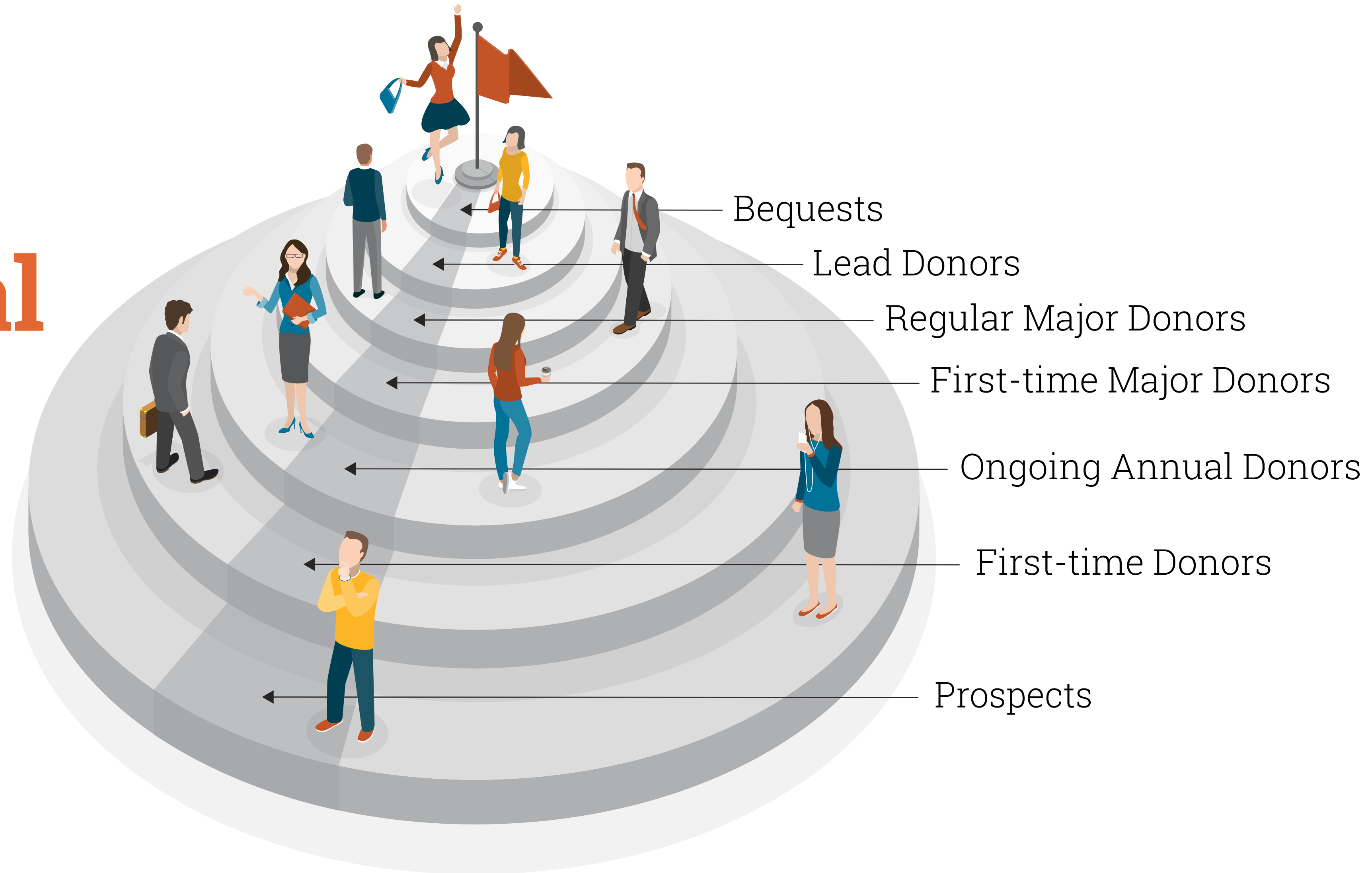
Ages 71+

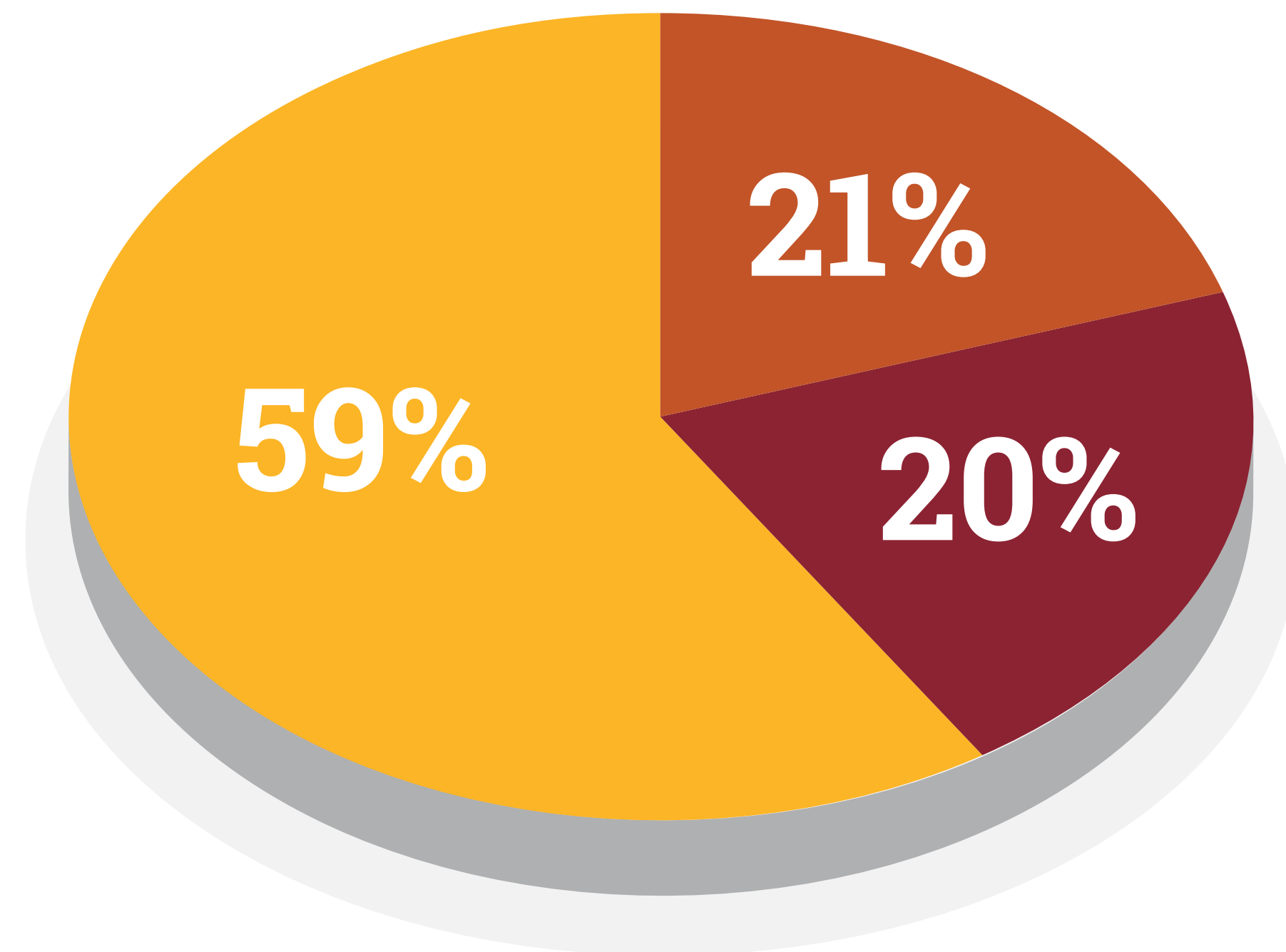
64% Very Important

68% Have a Will

14% Have None

The Typical Donor Pyramid





- 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

Who is our Audience?

Key Takeaways

- Age, Loyalty, Frequency, Affinity, lapsed donors
- Demographic shift
- Generational differences
- Giving patterns
- 80/20/20 rule - List/Offer/Creative
- Train staff to listen for donor cues



4

**What do I say? What
is the right message,
at the right time?**

Key Things to Remember When Crafting Planned Giving Messages:

Wording impacts receptivity.....

- Use family words
- Keep it simple/be conversation
- Eliminate jargon
- Use testimonies - “social norming”
- Reference life connections
- Use “mixed packaging” approach
- Apply neuroscience principles



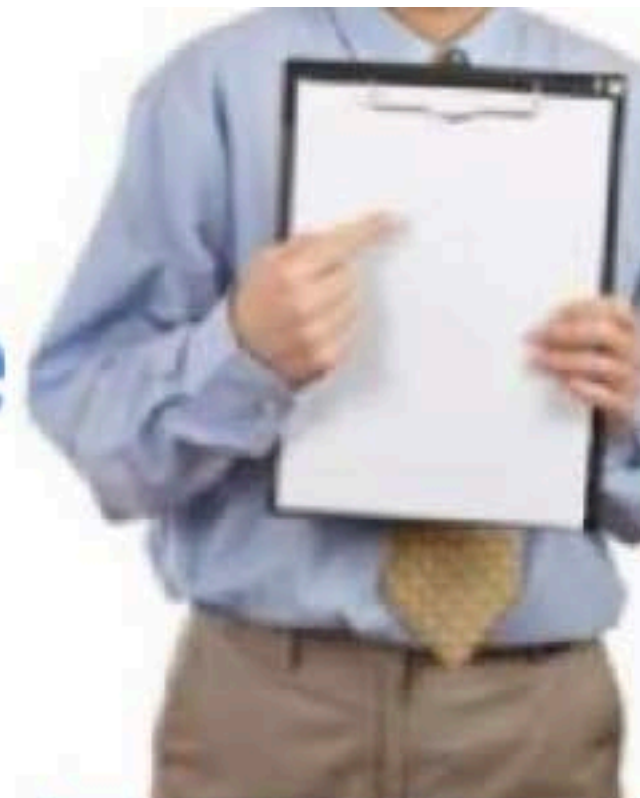
**Social
Realm
(identity)**
I help people
because of who I
am

**Use
family
language**

Stories
and
simple
words

**Avoid
market
language**

Formal,
legal, or
contract
terms



**Market
Realm
(exchange)**
I engage in
transactions by
formal contract

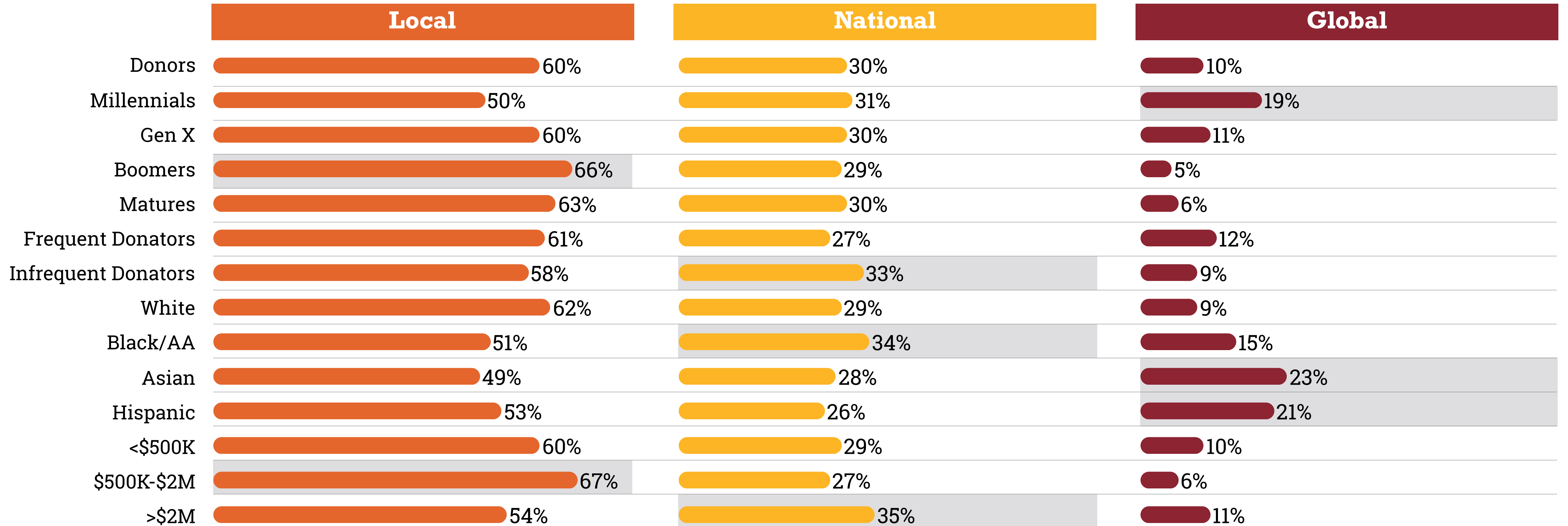
**Would you say it in a normal
conversation with your grandmother?**

Donors like to keep it close to home

- 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



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,

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.



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.

Unfortunately, there's much more to be done, and we need your help to ensure we can be there to feed families in Ross 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 Ross 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,

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 Ross County don't go to school hungry.



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.

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 Jackson 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,

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 Jackson County don't go to school hungry.

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

YOUR GIFTS AT WORK



AMIT SERVES MORE THAN **30,000 STUDENTS** A YEAR IN **110 SCHOOLS** IN **29 CITIES** throughout Israel.



3 AMIT HIGH SCHOOLS were among 20 in all of Israel cited by the Ministry of Education for excellence in values education.



95% of our students serve in the Israel Defense Forces and perform National Service upon graduation.



80% OF AMIT STUDENTS are graduating high school with a *bagrut diploma*, as compared to only 63 percent of all Jewish high school students in Israel.



2 AMIT PRINCIPALS

named Outstanding Principals of the Year by their municipalities for 2013/14.



MORE THAN 40 MUNICIPALITIES are on a waiting list to join the AMIT Network and benefit from our cutting-edge pedagogical expertise.



We are able to provide innovative services and programs to **MORE THAN 1,000 CHILDREN WITH DISABILITIES** who are mainstreamed in AMIT schools.



Students in the film programs at AMIT Kiryat Malachi and AMIT Or Akiva, both located in development towns, have produced award-winning films, shown at national and International student film festivals.



Connect the dots for donors between gifts and mission

Focus on impact

Show the value of current programs

Reinforce urgency for the future



Lasting Legacy



Alzheimer's Disease Research
Macular Degeneration Research
National Glaucoma Research

FINANCIAL & GIFT PLANNING IDEAS FOR FRIENDS OF BRIGHTFOCUS FOUNDATION

Your Gifts at Work

Helping to End Brain and Eye Disease

When you make a gift to one of the programs at BrightFocus Foundation, you are joining our fight to eradicate Alzheimer's disease, macular degeneration and/or glaucoma. Your support allows us to fund innovative worldwide research for mind and sight, and to promote better brain and eye health through educational programs and materials.

One out of every 16 Americans over the age of 40 suffers from Alzheimer's, macular degeneration or glaucoma. Left uncured, caregivers, communities and our nation will continue to experience an increasing strain on social and economic resources.

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.

Leave Your Legacy

Join us in our commitment to slowing, preventing and treating brain and eye diseases. This newsletter focuses on ways you can continue to support our mission, how we meet our current and future needs, as well as some of the benefits of your support that you can receive from your generosity. If you have any questions or need help finding a gift option that fits your circumstances, please contact Barbara S. Spitzer at 1-800-437-2423 or bspitzer@brightfocus.org.



INSIDE • You Have the Power to Help Us Save Mind and Sight page 2
• Who's on Your Shopping List? page 4

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.

What do I say?

Key Takeaways

- Family words
- Simple/conversational
- Eliminate jargon
- Donor stories
- Reference life connections
- Localize messaging
- Focus on impact



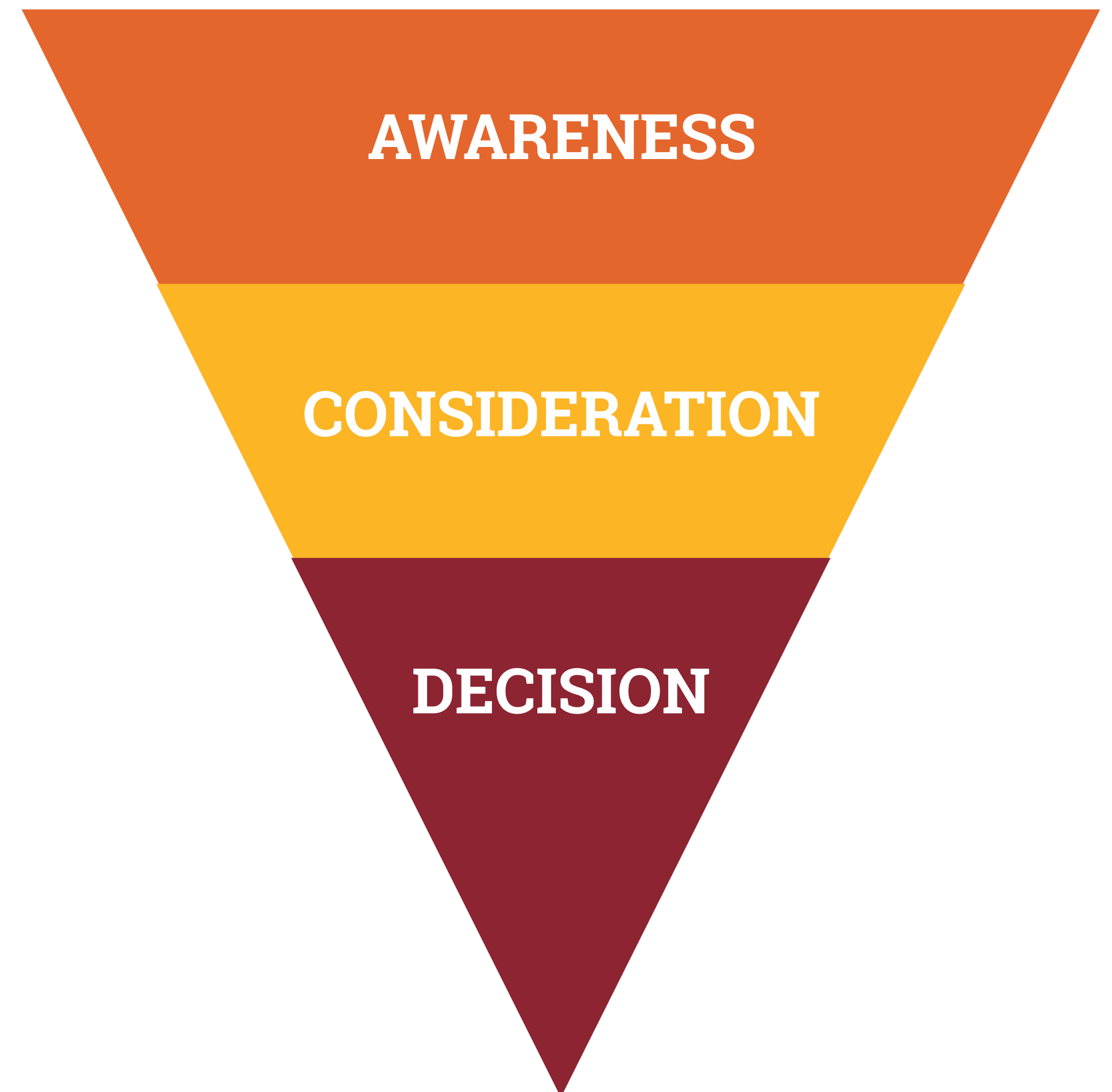
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How? Tactics

Marketing Funnel

Awareness

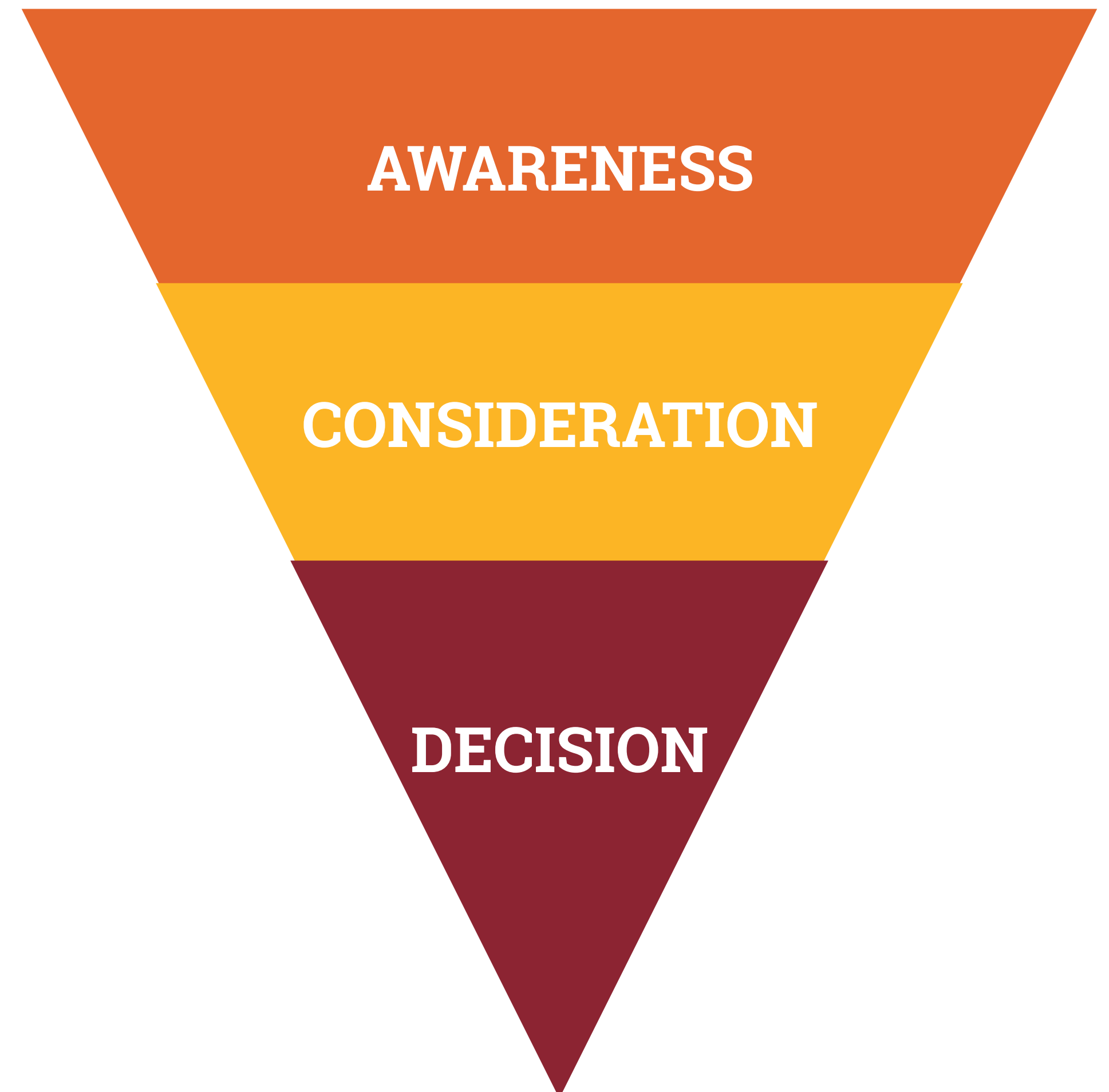
- Introduce an issue
- Educate the donor
- Provide tools for donor research / action
- Demonstrate the need
- Illustrate next steps



Marketing Funnel

Consideration

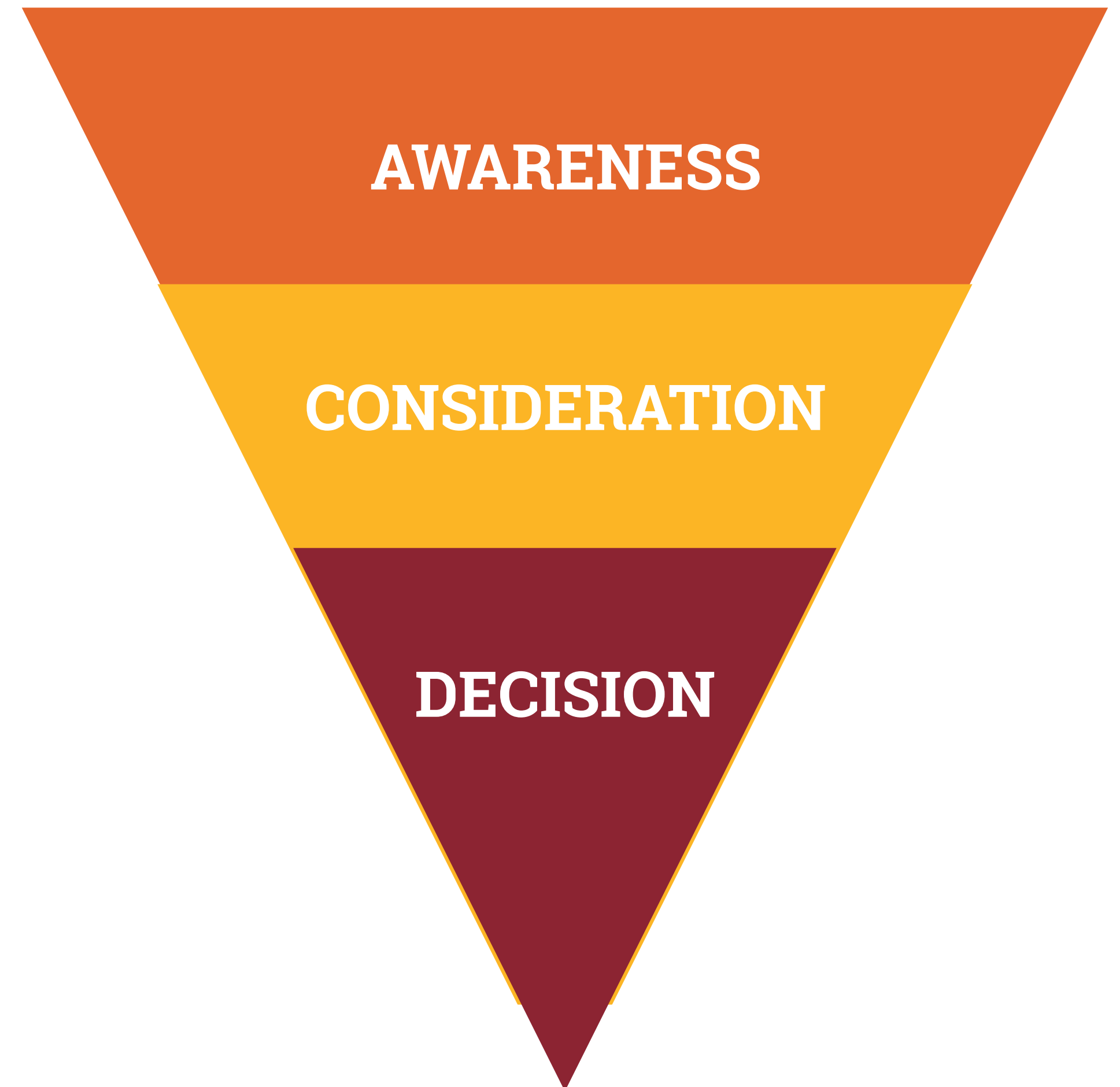
- Build a relationship with the donor
- Show proof of effectiveness
- Satisfy and alleviate concerns
- Develop enthusiasm
- Eliminate the hurdles against the gift
- Inspire action



Marketing Funnel

Decision

- Validate donor intent
- Begin donor stewardship
- Update and inform



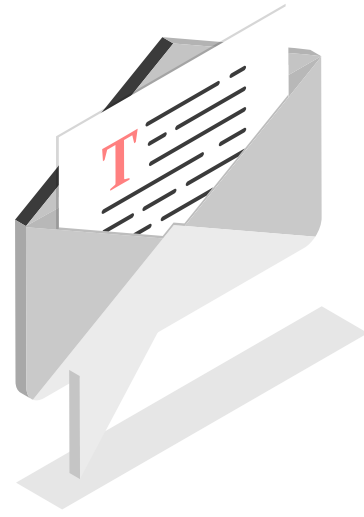
Marketing Drivers



Direct
Mail



Targeted
Mail



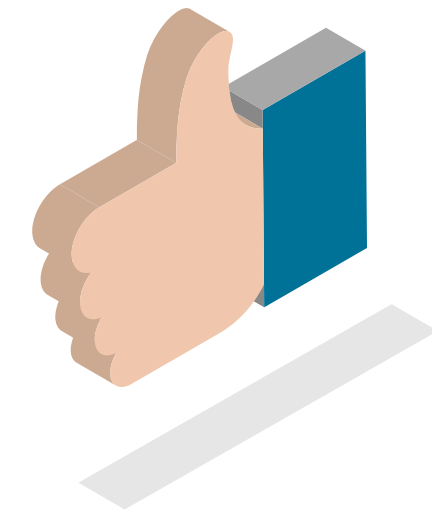
Educational
Email



Targeted
Email



Mail & Email
Survey

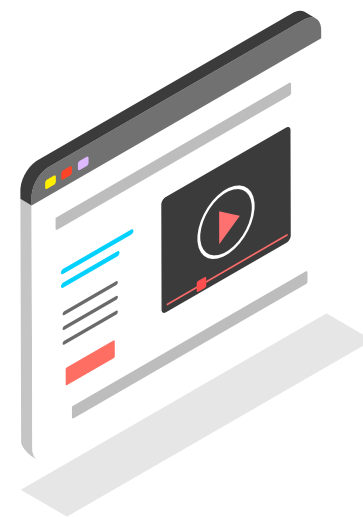


Social

Marketing Destinations



Collateral



Landing Page



P/G Website

Partner with in-house teams to maximize your PG message

Leverage Current Touch Points

Current Touch Points	Ideas
Annual Report	Ads
Brochures	Advertorials
Campaigns	Articles
Direct Mail	Buckslips
Email	Banner Ads
Events	Check boxes
Face-to-Face	Speakers
Gift Receipts	Inserts
Magazine	Stories
Newsletter	Side Bars
Social	Testimonies
Web	Microsite

Create a calendar of all your marketing and organizational events

Create a calendar all your marketing and organizational events



Research, examine
and test your list

Plan beyond a
12-month cycle

Use multiple
channels to spread
your message



JOIN THE MUSEUM'S LEGACY CHALLENGE FOR FUTURE GENERATIONS

If you have included the Museum in your will or other long-term plans, our Legacy Challenge Fund will donate \$5,000 to the Museum as a matching gift in your honor.

Your planned gift may not be realized for years to come, but you can make a big impact today. Tell us about your intention and immediately direct the Legacy Challenge matching funds to support your favorite area of the Museum.

ACT NOW! - Matching funds are limited for new or increased gift notifications. Call 206-768-7199 or email sdolese@museumofflight.org to find out more.



SOARING INTO TOMORROW
Make an Impact For Future Generations

Join the Museum's Legacy Challenge and make a bigger impact than you ever thought possible.

 +
  =
 

Leave a gift in your will or living trust (and let us know). A \$5,000 matching gift is made in your honor to the area of your choice. Impact future generations today.

Help secure the future of the Museum by notifying us of your intention today. Contact Sandra Dolese at 206-768-7199 or sdolese@museumofflight.org.



"BUILDING SOMETHING Better"

The Red Barn, birthplace of Boeing Airplane Company, symbolizes the legacy of flight for Boeing, its employees, and the world.

You can continue to build on the Museum's historic foundation and inspire future generations taking to the skies. *All that's needed is a plan.*

Remember The Museum of Flight in your will and preserve aviation's heritage for years to come. With many gift options available, you're sure to find one that meets your needs and goals.

GET STARTED! Contact us at 206-768-7199 or sdolese@museumofflight.org to learn more.



ONE SMALL Step
FOR FUTURE GENERATIONS

Buzz and Neil made a lasting impression with "one small step for man, one giant leap for mankind." You, too, can inspire the next generation of adventurers while helping the Museum soar into the future. How? Simply by including The Museum of Flight in your will.

Our Legacy Challenge *For Future Generations* allows you to make a difference today *and* tomorrow. Notify us of your plan and the Challenge Fund will give \$5,000 in your honor.

ACT NOW! Call 206-768-7199 or email sdolese@museumofflight.org to find out more.

CREATE A LEGACY OF FLIGHT

REMEMBER THE MUSEUM IN YOUR WILL OR LIVING TRUST

Your will or living trust not only protects your loved ones, but can also be used to define your legacy, supporting the places you're passionate about—like The Museum of Flight. When you remember the Museum through a gift in your will or living trust, you join a special group of people who have helped shape the Museum into what it is today.

ADVANTAGES

- **Simplicity.** As little as one sentence in your will or living trust is all that is needed to complete your gift.
- **Flexibility.** Until your will or trust goes into effect, you are free to alter your plans.
- **Versatility.** You can give a specific item, an amount of money, a gift contingent upon certain events, or a percentage of your estate.

HOW TO MAKE YOUR GIFT

Thank you

for supporting the future of The Museum of Flight! If you have questions about the Legacy Challenge, or would like to notify us of your gift, please contact:

Sandra Dolese, CFRE, CSFG
Planned Giving Program Manager
206-768-7199
sdolese@museumofflight.org

Rocketing to the Moon FOR FUTURE GENERATIONS

GRATEFULLY HONORING THE PAST

When Randa and Jonathan Abramson met in 2002, they were surprised to learn that aviation was one of the interests they shared. Randa was a member of the Museum's capital campaign staff; to build the T.A. Wilson Great Gallery. From 1984 to 1994 she worked closely with Alison Bailey, who is now the Museum's longest-tenured employee. Randa is designating her Legacy Challenge matching gift to honor Alison and their work together.

challenge offer to earn a \$5,000 donation for the their attention when Randa and Jonathan were in after the birth of their grandson. They wanted to include The Museum of Flight, being impressed with the impact Museuming on youth, they each have personal e Museum.

Randa's father was an aeronautical engineer, working with gyroscopes, guided missiles and on the Manhattan Project. Randa began working with nonprofits, and she recalls, "The Museum of Flight was the only fundraising project my father understood." Her son echoes that sentiment; when asked what his mother does, he says with pride, "Mom helped build The Museum of Flight."

Jonathan says, "In addition to being proud of Randa for walking out on a wing to build the Great Gallery, I'm making a 'gratitude gift' for the team that did the fundraising and for...all the people that made it happen."

Jonathan's father was also involved in aviation. When all his buddies were being drafted into the Korean conflict, Jonathan's dad opted to become a "flyboy" 18 years old when he completed flight training, he was assigned as a B-29 turret gunner. His Air Sea Rescue Squadron flew out of Guam in B-29s equipped with boats in the bomb bays. On Jonathan's first visit to the Museum with his own son, they found themselves in the midst of a reunion of B-29 crew members. It was a special moment, seeing veterans—men just like Jonathan's father—reuniting and remembering.

On another visit to the Museum, Jonathan toured the Aviation Pavilion and saw the Museum's B-29, T-Square. It's a pristine renovation of a plane similar to the one my father and his crewmates spent two years of their young lives flying rescue duty in."

By planning their future gifts, the Abramsons will make an impact that wouldn't have been possible during their lifetimes. Randa and Jonathan are proud to be part of sustaining this great institution for generations to come.

To learn how you can make The Museum of Flight a part of your legacy, contact Sandra Dolese at sdolese@museumofflight.org or 206-768-7199.

Stepping INTO THE Future

50 years ago, the Apollo 11 team of Buzz Aldrin, Neil Armstrong and Michael Collins landed on the moon. Help us celebrate their amazing accomplishment, while also helping us step bravely into the future, by joining our Legacy Challenge For Future Generations.

HERE'S HOW IT WORKS:

1. Make a gift to The Museum of Flight in your estate plan.
2. Notify us of your gift, and an additional \$5,000 gift will be made in your honor to the area of your choice.
3. Bring the history of flight to life for visitors today and tomorrow.

The matching pool, courtesy of a special donor, began with \$200,000. Be sure to notify us of your gift before the fund runs out.

With your notification, receive a complimentary copy of the book "For Future Generations" while supplies last.

THE MUSEUM OF FLIGHT

MAKE THE MOST OF YOUR RETIREMENT PLAN ASSETS

THE MUSEUM OF FLIGHT SUMMER 2019

Dear Stella,

In 1969, American astronauts landed on the moon. Two of them walked on its surface; all three came back with artifacts and stories. Many of these artifacts are here at The Museum of Flight this summer.

What will your footprint be?

You can impact the next generation of engineers, pilots and astronauts. Your future support is mission critical for the Museum's programs and exhibits to keep them reaching for the stars.

Why wait? You can reap rewards today with our Legacy Challenge For Future Generations. A matching gift will be made in your honor when you notify us that you've made a gift to the Museum in your estate plan, allowing you to make a difference today and tomorrow.

I hope you'll visit us for Destination Moon: The Apollo 11 Mission, here until September. Thank you for being a friend to the Museum.

Sincerely,
Matt Hayes
Matt Hayes
President and CEO

Step into the future with us

Contact Sandra Dolese at 206-768-7199 or sdolese@museumofflight.org to get started.

WHAT WILL YOUR LEGACY BE?

Please take a moment to share what you envision the Museum will accomplish in the next 50 years and beyond.

LEGACY CHALLENGE

Please complete and return this form in the enclosed envelope today. Thank you!

I'm in! I have included a gift to The Museum of Flight in my estate plan but haven't notified you yet.

Please contact me so I can direct my \$5,000 matching gift to:

- Education
- Restoration & Collections
- Operations & Facilities
- Volunteers
- Library & Archives

I want to learn more about supporting the Museum with a planned gift.

Share your story on the back. →

Name—Please print, _____

Address _____

City, State, ZIP _____

Telephone _____

Email _____

We respect your privacy. Information collected here will not be shared outside of our organization without your permission.

Take the Next Step

The 1984 campaign and operators staff included Randa Cleaves Abramson, far right, and Alison Bailey, back row, 6th from right. Photo credit: Vera Rutledge.

Randa and Jonathan Abramson

I'm making a 'gratitude gift' for the team that did the fundraising [for the Great Gallery] and for...all the people that made it happen.

— Jonathan Abramson
Eagle Heritage Society member and Legacy Challenge participant

THE MUSEUM OF FLIGHT

The Museum of Flight Foundation
3401 EAST MARGINAL WAY, S. | SEATTLE, WA 98108-4021

Take the Next Step WITH US



Your Gift Matters



Make Your Flight Last Forever!

Generosity comes in many forms, and it's often the best way for you to support important causes that matter the most to you in your life. When you give to The Museum of Flight, you help us share the thrilling story of flight for generations to come.

Start here by learning the different gift options available to you. We can work with you to find a charitable plan that provides for your family and allows your love of aviation to endure forever.

Already included in your estate plan?

[Let Us Know](#)



Not sure how to get started?

To get started, consider how you want to plan your gift.

What's New?

- [Check Your Plan's Health](#)
- [Do I Need an Estate Plan?](#)
- [How to Keep Your Documents Safe](#)

[View All Articles](#)

Eagle Heritage Society

- [Learn about this passionate group of supporters today](#)
- [I want to become a member](#)

Donor Stories

- [Read the stories of some of our supporters](#)



Not Sure How to Begin Planning?

[Download Our FREE Personal Estate Planning Kit](#)



INSIDE

- 3 Stages of Will Planning
- Avoid Taxes to Leave a Bigger Legacy
- Protect Those Who Matter Most

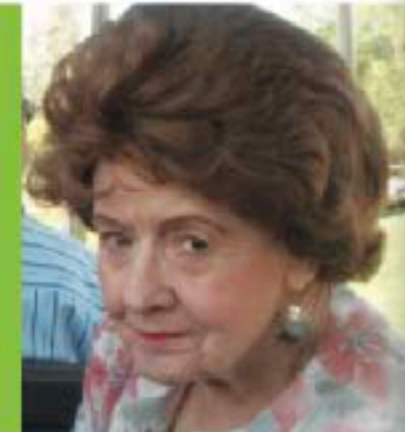
TRAILBLAZER CREATES LEGACY TO SAVE SPECIES

Lillian Hagener Bell was a trailblazer in many ways. From her beginnings in Silverdale, Washington, as part of the first set of twins born in that region, to her decision to enter the Marine Corps in the 1950s, Lillian was a leader right from the start.

After years of working as a telephone operator with her twin sister, Lila, she decided that she wanted to strike out on her own and experience the world. Lillian went on to become one of the first five females to attend drill instructor training, achieved the esteemed ranking of Lieutenant Colonel and served on numerous military trials throughout her distinguished 36-year career in the Marines. Sunshine Voss, Lillian's granddaughter, also recalls her penchant for learning. She was highly educated, with a bachelor's degree in history and a master's degree in education.

While Lillian was a strong and determined woman, she also had a playful side. "She really liked sports cars and driving fast," Sunshine remembers. "She would change

The late Lillian Hagener Bell passed on her love of animals to others and remembered Woodland Park Zoo in her estate plan.



into a muumuu made by her sister after wearing her military uniform all day, put on her flip flops and literally let her hair down!"

Along with her love of learning (and fast cars!), Lillian had an exceptional attachment to animals. From her work on the farm as a young girl, to her own house cats, to the bears at the zoo, Lillian always appreciated the wonder and magic that animals brought to the world.

Continued on Page 2



TRAILBLAZER CREATES LEGACY TO SAVE SPECIES

Continued from Page 1
Sunshine recalls many trips to Woodland Park Zoo where she said family and friends would continually come away having learned something from Lillian about conservation.

"She had an awareness about the importance of the preservation of our wild animals, and she passed that on to whoever she was with."

Sunshine says, "My grandmother was a gracious and loving person. She felt it was our responsibility to provide for the future and make others conscious of animals that are in danger of becoming extinct."

Thank you, Sunshine, for sharing your memories of your wonderful grandmother and thank you Lillian for remembering Woodland Park Zoo so generously in your estate plan. Your legacy gift will help Woodland Park Zoo create a social movement to save species for future generations.

Like Lillian, you can recognize the importance of what we do at Woodland Park Zoo by including us in your will or other estate plans. Contact Sarah Valentine at 206.548.2624 or sarah.valentine@zoo.org to learn how you can make an impact with a future gift.



ONE OF THE MOST IMPORTANT TALKS YOU'LL EVER HAVE

- Self-sufficiency of grown children;
- Changes in tax law; or
- A desire to make a gift to Woodland Park Zoo.



... in the enclosed envelope today. Thank you!

One of the _____
Name (Please print) _____
_____ Telephone _____ Email _____

BUSINESS REPLY MAIL
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POSTAGE WILL BE PAID BY ADDRESSEE

LIONHEARTS SOCIETY
WOODLAND PARK ZOO
10000 PHINNEY AVE N
SEATTLE WA 98103-9801

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UNITED STATES



Dear Stella,

It is my pleasure to provide you with the latest edition of Woodland Park Zoo's *Lionhearts Society*. Our spring newsletter includes several strategies for a meaningful legacy of giving. You will learn how to create or update a will, as well as ways an estate plan can protect your family. I hope the material informs and inspires you.

You will also read about Lillian Hagener Bell, a trailblazer in every way, and whose legacy gift to Woodland Park Zoo will provide world-class animal care and enable all children and their families to engage in extraordinary zoo experiences for generations.

The zoo's history as a beloved community treasure and a pioneer in creating naturalistic exhibits where animals thrive is foundational. But, we have realized this is not enough. We are determined to build upon our history of innovation and leadership and transform the way we think and act to save species.

A legacy gift is a transformational investment that will help Woodland Park Zoo redefine the relationship between people, our planet and all of its creatures and step forward as a leader in a social movement to save species for future generations.

As one of our most loyal champions, you have helped make Woodland Park Zoo a recognized regional and global leader that saves wildlife and inspires everyone to make a priority in their lives. Thanks to you, our zoo will empower millions here and across the nation to be an active player in conservation action that is critical for the health of the planet and wildlife.

With heartfelt thanks,

Sarah K. Valentine, CFRE
Vice President of Development
206.548.2624
sarah.valentine@zoo.org

P.S. I welcome an opportunity to speak with you if you have questions about any ideas covered in this newsletter or if you are ready to make or update your gift of a lifetime to Woodland Park Zoo. I'm always happy to help.

Dear Salutation,
Thank you for completing this survey. Your feedback is very important to us. The personal information you provide will not be shared outside of Seattle Humane.

START HERE

- 1 In what ways have you been involved with Seattle Humane? (Please check all that apply.)**
- 1. Adopted a pet from Seattle Humane
 - 2. Volunteer my time
 - 3. I am/was an employee
 - 4. Attend fundraising events
 - 5. If family member attend classes or educational events
 - 6. Read Seattle Humane publications or follow on social media
 - 7. Made a financial contribution
 - 8. Other: _____

2 Please circle the number that best represents your LEVEL OF INTEREST in the following Seattle Humane funding priorities:

	VERY INTERESTED	SOMEWHAT INTERESTED	NEITHER INTERESTED NOR DISINTERESTED	SOMEWHAT DISINTERESTED	NOT AT ALL INTERESTED	DONT KNOW
1. Pet adoption programs	1	2	3	4	5	6
2. Low-fee spay/neuter services	1	2	3	4	5	6
3. Funds for animals with special medical needs	1	2	3	4	5	6
4. Life-Saver Rescue program to accept pets from other shelters	1	2	3	4	5	6
5. Community outreach programs that keep people and pets together	1	2	3	4	5	6
6. Pet Loss Support sessions	1	2	3	4	5	6
7. Pet Guardian program to care for your pet if you cannot		2	3	4	5	6
8. Natural disaster and rescue services	1	2	3	4	5	6
9. Humane education programs for children	1	2	3	4	5	6
10. Capital projects to maintain and improve facilities	1	2	3	4	5	6
11. Areas of greatest need	1	2	3	4	5	6

3 Please circle the number that best represents HOW IMPORTANT EACH of the following factors would be if you were to consider making a gift to Seattle Humane:

	VERY IMPORTANT	SOMEWHAT IMPORTANT	NEITHER IMPORTANT NOR UNIMPORTANT	SOMEWHAT UNIMPORTANT	NOT AT ALL IMPORTANT	DONT KNOW
1. Personal satisfaction of giving	1	2	3	4	5	6
2. Expanding spay and neuter programs/education	1	2	3	4	5	6
3. Saving and serving homeless pets in need	1	2	3	4	5	6
4. Giving back to pets and owners in my community	1	2	3	4	5	6
5. Furthering the mission of Seattle Humane	1	2	3	4	5	6
6. Giving in honor or memory of a loved one or pet	1	2	3	4	5	6
7. Immediate tax advantages	1	2	3	4	5	6
8. Future income, tax and other financial benefits	1	2	3	4	5	6

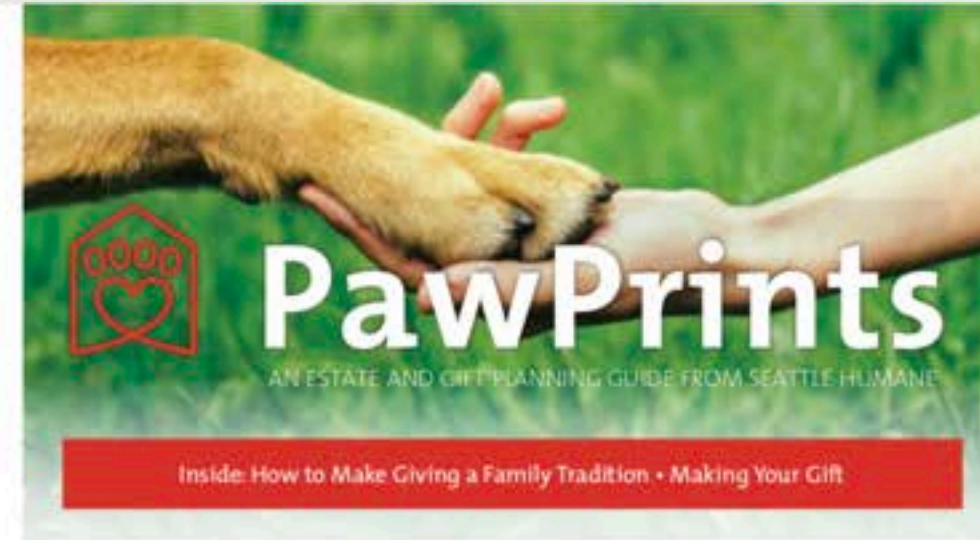
TELEPHONE _____

ADDRESS _____

CITY _____ STATE _____ ZIP _____

EMAIL _____

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



PawPrints

AN ESTATE AND GIFT PLANNING GUIDE FROM SEATTLE HUMANE

Inside: How to Make Giving a Family Tradition • Making Your Gift

Pet Guardian Program Gives Pearl a New Home

When we plan for the future, we make arrangements to care for our family and favorite charities, like Seattle Humane. Unless we also make plans for our furry family members, they will pass to next of kin like personal property. For those who aren't certain who will care for their pets when they pass, Seattle Humane's Pet Guardian Program provides an option. Enrollment in the program requires pet owners to specify in their will or trust document that their pets are to be entrusted to Seattle Humane for rehoming upon their death.



Pearl has a new home and is living out her senior years basking in sunshine and love.

her time curled up asleep in a staff member's lap, waiting to meet her new family. As a senior kitty, we knew it might take some time for the right match to happen.

The goal of the Pet Guardian Program is to provide peace of mind that our beloved pets will be cared for when we're gone. The family of Becky, who recently passed from cancer, received that peace of mind when they could not take in Pearl, Becky's beloved 16-year-old kitty. When Pearl first arrived at the shelter, she was scared and shy, having lost the only caretaker she had ever known. Once Pearl was more comfortable, she moved to the adoption area where she spent

Then one day, an elderly woman named Emma visited our adoption center and was taken with Pearl. She went home and couldn't sleep, thinking about Pearl, who had lost the only home she knew and was the oldest cat at the shelter. Emma

Continued inside

How to Make Giving a Family Tradition

her they occur year-round or during the holidays, family traditions deepen relationships across generations—especially family traditions focused on philanthropy.

giving to others, children, teens and grandparents come together for a common cause. Encourage them to decide what issues the family cares about and then work together to make a difference. The act of giving together can turn an impulse into a tradition that is meaningful and purposeful.

How to start your tradition:

Begin early: Encourage small children to donate their toys or participate in a simple charitable activity. As they grow, encourage them to talk about their interests. Accept that their idea of giving back may differ from yours.

Volunteer together: Participate in family volunteer opportunities in your community. It's a great way to see firsthand who or what your family values. Plus, making a difference together feels good.

Make Your Tradition Last

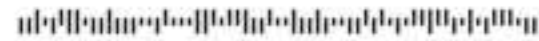
Extend your tradition of giving beyond your lifetime—and set an example for future generations—with a gift from your will to Seattle Humane. Contact us for details.



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SEATTLE HUMANE SOCIETY
13212 SE EASTGATE WAY
BELLEVUE WA 98005-4492

Place Stamp Here



Fold in half and tape closed.



Make Your Final Wishes Come True



Make Your Final Wishes Come True

Your gift can be a specific asset, such as securities or property, or a percentage of your estate. It can be flexible—it can be updated or changed in as few as four steps.

1. Determine whether you'd like to leave a percentage.
2. Decide if you want to direct your gift or leave your gift unrestricted, or for pressing needs.
3. Contact Scott Fraser at (425) 373-5387 to return the attached reply card to complete your gift.
4. Share the sample language with your attorney to put in place.



The Humane Society for Seattle/King County
13212 SE Eastgate Way
Bellevue, WA 98005

There are endless ways to make the most of life's changes. A thoughtful, well-managed estate plan is one of them. With a little forward-thinking, you can create a future plan that not only works for you but also Seattle Humane. Get the details in this edition of *PawPrints* and follow the steps below to get a jump start on making a difference at Seattle Humane.

RETURN the attached reply card to get your FREE guide *Make Your Final Wishes Come True* to learn about how to make a meaningful gift in your will and save specific assets.

VISIT myimpact.seattlehumane.org to learn how you can support pets in need with a gift in your estate plan.

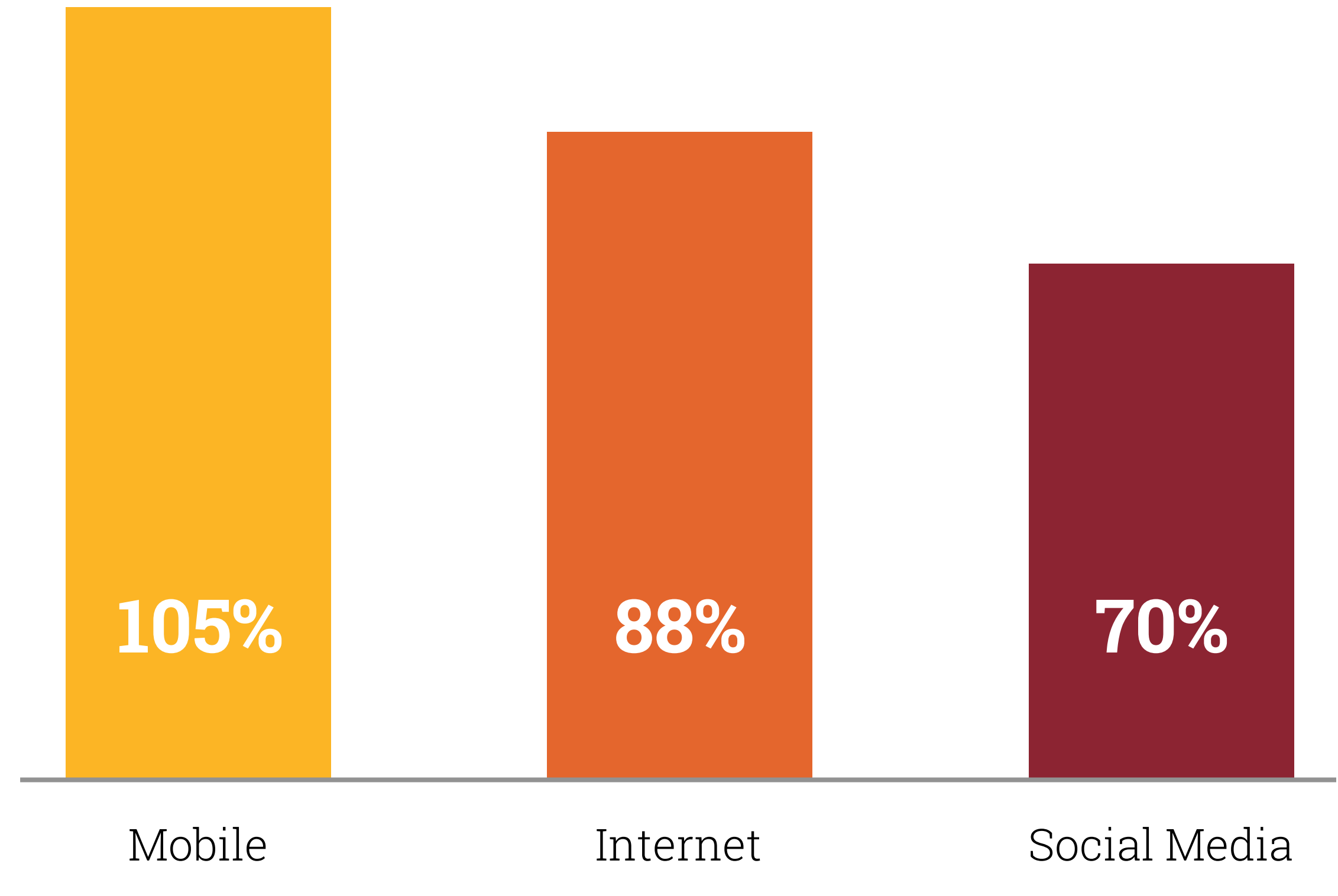
CONTACT Scott Fraser at (425) 373-5387 or scott@seattlehumane.org to discuss how a future gift to Seattle Humane can work for you.

Your Will Can Further Our Mission

We would love to talk with you about how a gift in your will can make a meaningful difference for animals in need in our community. Contact Scott Fraser at scott@seattlehumane.org or (425) 373-5387 to get started.



2018 Digital Use In The U.S.



Takeaway:

The U.S. is a mobile country

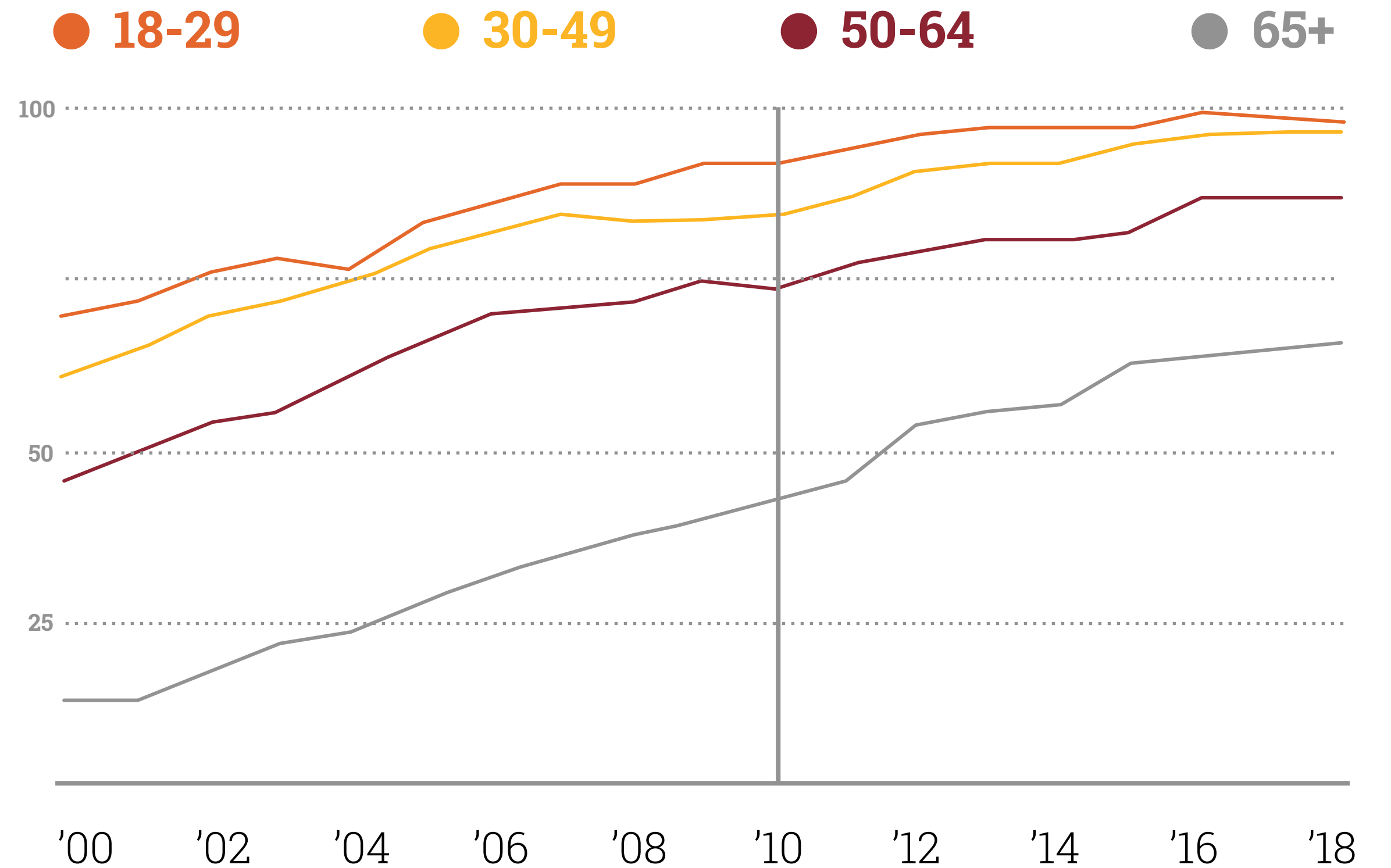
Total US Population = 326 million

Mobile subscriptions = 341 million

Internet users = 287 million

Social Media users = 230 million

Internet Usage in U.S.



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

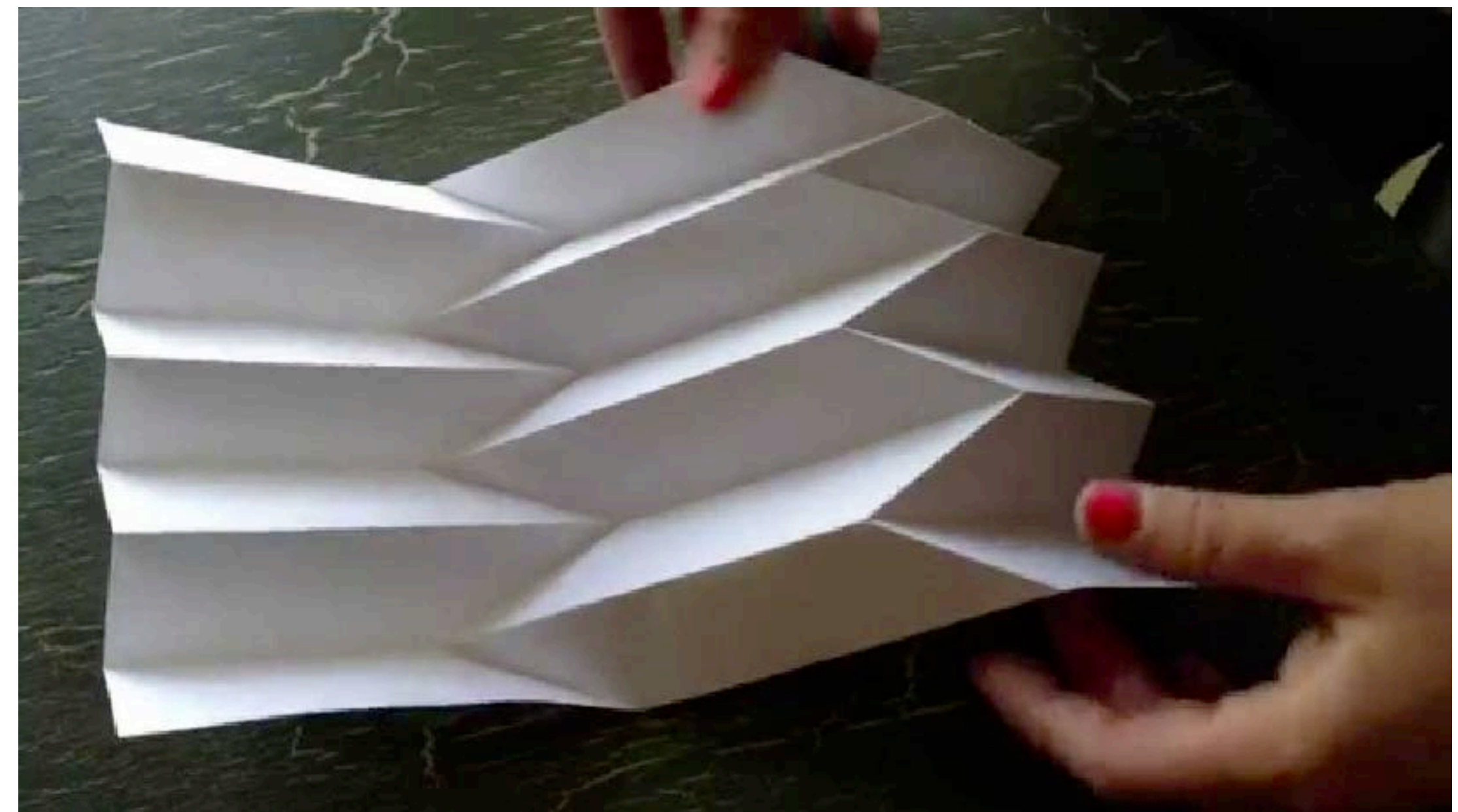
Takeaway:

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

How? Tactics

Key Takeaways

- Understand the marketing funnel
- Difference between marketing drivers and marketing destinations
- Leverage current touch points
- Create a detailed calendar
- Leverage digital opportunities
- Build a multi-channel plan



6

Trends/New Ideas



BUSINESS OBJECTIVE

Educating Donors	Education + Conversion	Conversion + Growth
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CONTENT FOCUS

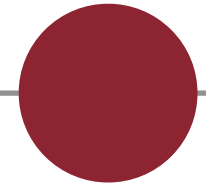
Technical (PG 101)	Impact + Technical	Impact + Viability
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AUDIENCE

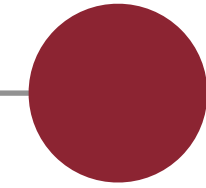
Older-Oldest Americans	Multi-Generational	Multi-Generational
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STRATEGY

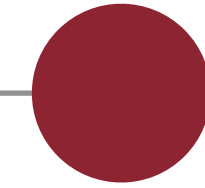
NFP Controls Conversation	Donor-Centric	Donor-Driven
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**What Medium
Works for You?**



**Focus Your
Messaging**



**Be Open to New
Channels**

Legacy Challenge

PLANNED GIVING

WHY IT'S CRITICAL TO OUR WORK

Planning for the future is always a good idea, no matter where you are in life. The Museum of Flight relies on the foresight of those who include a gift to the Museum in their financial or estate plans. These planned gifts can be made now to immediately support our mission, or they can take effect in the future as a final way to leave your legacy.

- Depending on the gift arrangement you choose, you can:
- Feel secure about the future of your loved ones.
 - Maintain control of your assets for life.
 - Receive tax benefits.
 - Give more than you ever thought possible.

HERE ARE A FEW POPULAR PLANNED GIVING OPTIONS:
 Gift of appreciated securities: If you've owned stock for more than a year, and it's increased in value, donate the stock directly to the Museum. You may receive an income tax charitable deduction for the full fair market value of your gift when you itemize and eliminate capital gains tax.

Gift in your will or revocable living trust: This can be as simple as including a sentence in your will or living trust. Because this gift doesn't go into effect until after your lifetime, your current budget isn't affected, and you can change your mind at any time.

Gift of retirement plan assets: By naming The Museum of Flight as the primary beneficiary on the beneficiary designation form for a percentage (1%-100%) of your account's support the

Our Vision
 To be the foremost educational air and space museum in the world.

Our Mission
 The Museum of Flight exists to acquire, preserve and exhibit historically significant air and space artifacts which provide a foundation for scholarly research and lifelong learning programs that inspire an interest in and understanding of science, technology and the humanities.



9404 East Marginal Way, S
 Seattle, WA 98108
 Tel: USA 206-768-7199

Sandra Dolise, OFE, CSPG
 Planned Giving Program Manager
 206-768-7199
 sdolise@museumofflight.org



LEGACY CHALLENGE
 Please complete and return this form in the enclosed envelope today. Thank you!

I have included a gift to the Museum of Flight in my estate plan but haven't notified you yet.

Please contact me so I can direct my \$5,000 matching gift to:

- Education
- Restoration & Collections
- Operations & Facilities
- Volunteers
- Library & Archives

I am considering a planned gift to the Museum.

Continued on back to share your story

Name—Please print: _____

Address: _____

City, State, ZIP: _____

Telephone: _____

Email: _____
We respect your privacy. We will not disclose your information to any third party.

"The Museum continues to fascinate not just by displaying the real, but by showing the story of flight. We must stimulate the curiosity of the public into understanding the need for a good education and what it can lead to."

—Greg Walker
 Eagle Heritage Society member



Dear Jeremy,

What a great time for than ever to make a Meet John and Fran \$5,000 Legacy Chal You can, too. It's ea

THE LEGACY CHALLENGE FOR FUTURE GENERATIONS

By leaving The Museum of Flight in your will or estate plan, you qualify for our Legacy Challenge. The first 40 donors to document a planned gift will be allowed to direct \$5,000 from our matching funds to the Museum area of your choice.

YES: I've included The Museum of Flight in my estate plan. Please direct a \$5,000 matching gift from the Legacy Challenge to:

- Collections & Restoration Fund
- Facilities & Operations Fund
- Library & Archives Fund
- Volunteers Fund
- Education Fund

First Name (Required) _____ Last Name (Required) _____
 First name Last name

Email (Required) _____
 First name Last name

COUNT ME IN!
 We won't share your information.

BONUS!
 Notify us of your donation and receive a copy of the book "For Future Generations, A History of the Museum of Flight." This \$80 value will be yours for FREE when you notify us of your future gift during the Legacy Challenge.

"The Museum continues to fascinate — not by just displaying the real, but by showing the story of flight. We must stimulate the curiosity of the public into understanding the need for a good education and what it can lead to."

—Greg Walker, Eagle Heritage Society member

YOU'RE INVITED! JOIN THE LEGACY CHALLENGE

No one could have pictured 55 years ago The Museum of Flight as it is today. When the Museum began—originally as PNAHF (Pacific Northwest Aviation Historical Foundation)—it was built on the passionate belief that the history of aviation and space should be preserved and shared. This dream of the Museum's founders has become an amazing reality thanks to the support of generous donors—like you. And as the Museum continues to grow, securing the future is more important than ever. We hope you'll join us as we look to tomorrow.

In celebration of the Museum's remarkable journey, a Legacy Challenge For Future Generations has been established to honor each person who includes the Museum in their future plans.

How does the challenge work?

- Leave a gift in your will or living trust (and let us know).
- A \$5,000 matching gift is made in your honor to the area of your choice.
- Impact future generations today.

- You can direct your donation to one of these areas:
- Education
 - Restoration & Collections
 - Operations & Facilities
 - Volunteers
 - Library & Archives
- The matching pool has a total of \$200,000. Thus, the Legacy Challenge will honor the first 40 people who notify us of their planned gift.
- The Legacy Challenge is a great way to maximize your giving. Make an impact today and for the future, too.
- What gifts qualify?**
 The Legacy Challenge acknowledges planned gifts that are confirmed in 2018 and will run for as long as the matching funds last. Gifts previously documented with the Museum may also qualify.
 You may participate in the Legacy Challenge even if you wish to remain anonymous regarding donor recognition.

Are you up to the challenge?
 If you have questions or would like to notify us of your gift, please contact Sandra Dolise at 206-768-7199 or sdolise@museumofflight.org today!

A \$50 VALUE—FREE!

As a bonus, when you notify us of your planned gift, you will receive a complimentary copy of the book "For Future Generations, A History of the Museum of Flight."

Thanks to your support, we can write the next chapters in our history.

While supplies last.

SHARE YOUR ADVENTURE!
 Please take a moment to share your favorite memory of The Museum of Flight.

Inspire Future Generations



JOIN US

100 YEARS IS JUST THE BEGINNING

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

Planned Giving Survey

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

Seattle Humane
Saving Lives. Connecting Families.

Dear **Salutation**,
Thank you for completing this survey. Your feedback is very important to us. The personal information you provide will not be shared outside of Seattle Humane.

START HERE

1 In what ways have you been involved with Seattle Humane? (Please check all that apply.)

1. Adopted a pet from Seattle Humane
 2. Volunteer my time
 3. I am/was an employee
 4. Attend fundraising events
 5. I/family member attend classes or educational events
 6. Read Seattle Humane publications or follow on social media
 7. Made a financial contribution
 8. Other: _____

2 Please circle the number that best represents your LEVEL OF INTEREST in the following Seattle Humane funding priorities:

	VERY INTERESTED	SOMEWHAT INTERESTED	NEITHER INTERESTED NOR DISINTERESTED	SOMEWHAT DISINTERESTED	NOT AT ALL INTERESTED	DON'T KNOW
1. Pet adoption programs	1	2	3	4	5	6
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8. Natural disaster and rescue services	1	2	3	4	5	6
9. Humane education programs for children	1	2	3	4	5	6
10. Capital projects to maintain and improve facilities	1	2	3	4	5	6
11. Areas of greatest need	1	2	3	4	5	6

3 Please circle the number that best represents HOW IMPORTANT EACH of the following factors would be if you were to consider making a gift to Seattle Humane:

	VERY IMPORTANT	SOMEWHAT IMPORTANT	NEITHER IMPORTANT NOR UNIMPORTANT	SOMEWHAT UNIMPORTANT	NOT AT ALL IMPORTANT	DON'T KNOW
1. Personal satisfaction of giving	1	2	3	4	5	6
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4. Giving back to pets and owners in my community	1	2	3	4	5	6
5. Furthering the mission of Seattle Humane	1	2	3	4	5	6
6. Giving in honor or memory of a loved one or pet	1	2	3	4	5	6
7. Immediate tax advantages	1	2	3	4	5	6
8. Future income, tax and other financial benefits	1	2	3	4	5	6

Setting Survey Objectives

Measure donor attitudes & obstacles prior to launching campaign

.....

Measure donor receptiveness to future program innovation or direction

.....

Gather donor demographics and affinity prior to starting a PG program

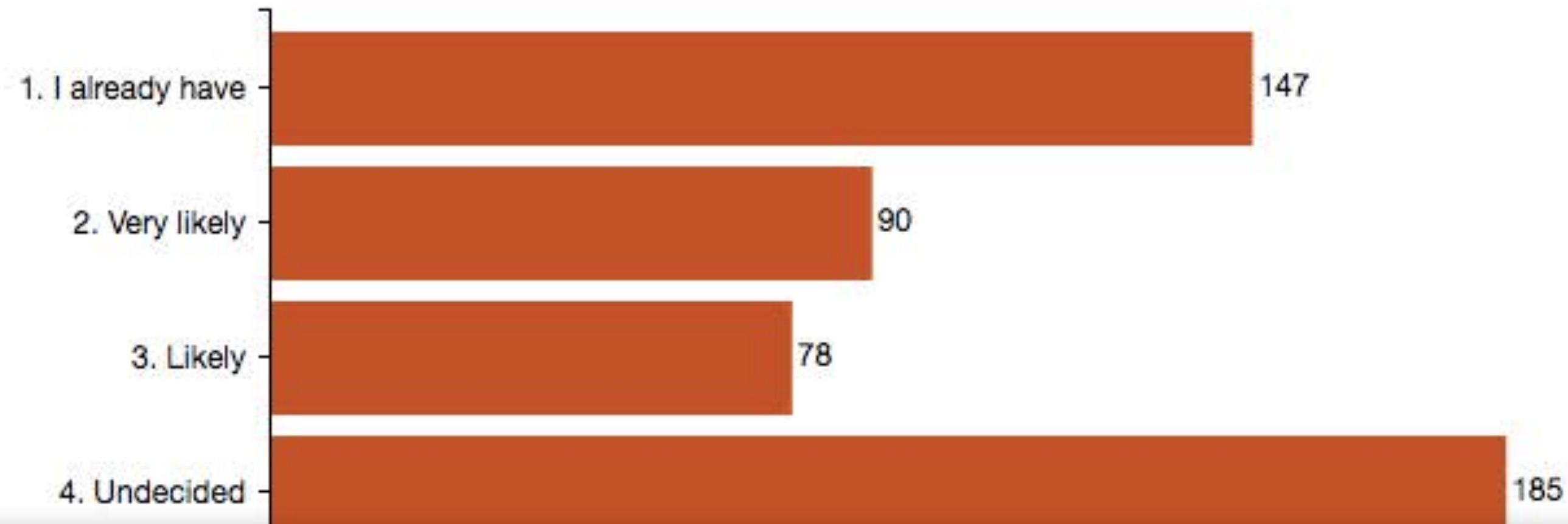
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Freshen a lagging program

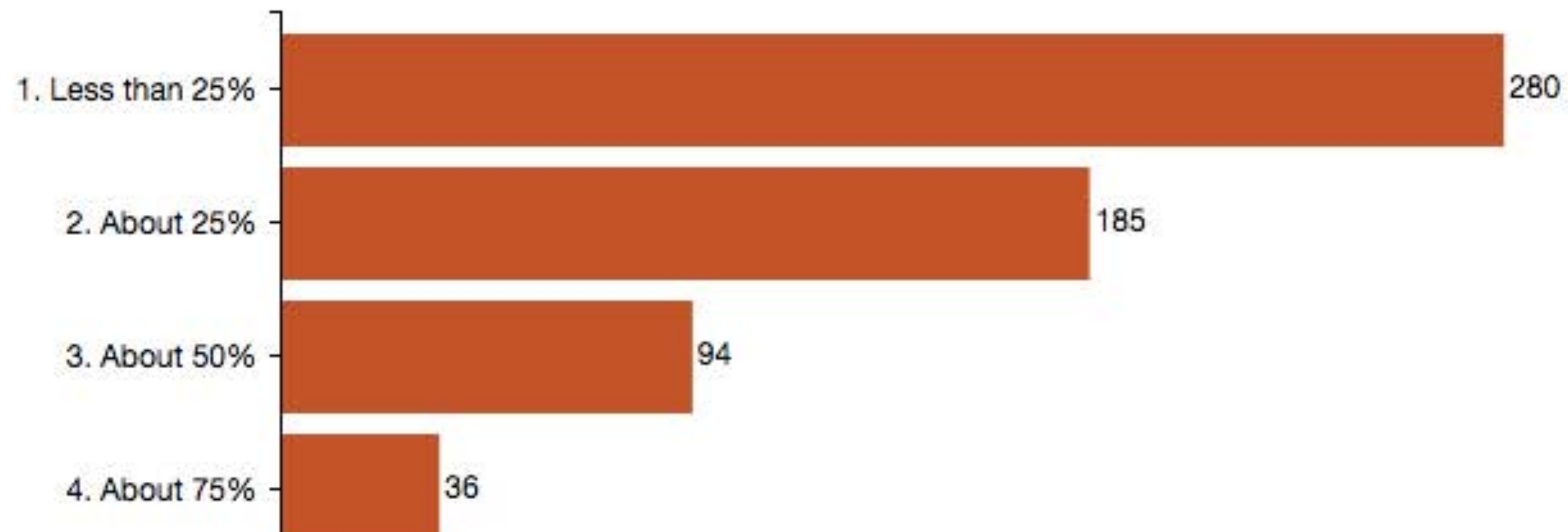
.....

Build an ongoing pipeline of qualified leads for cultivation

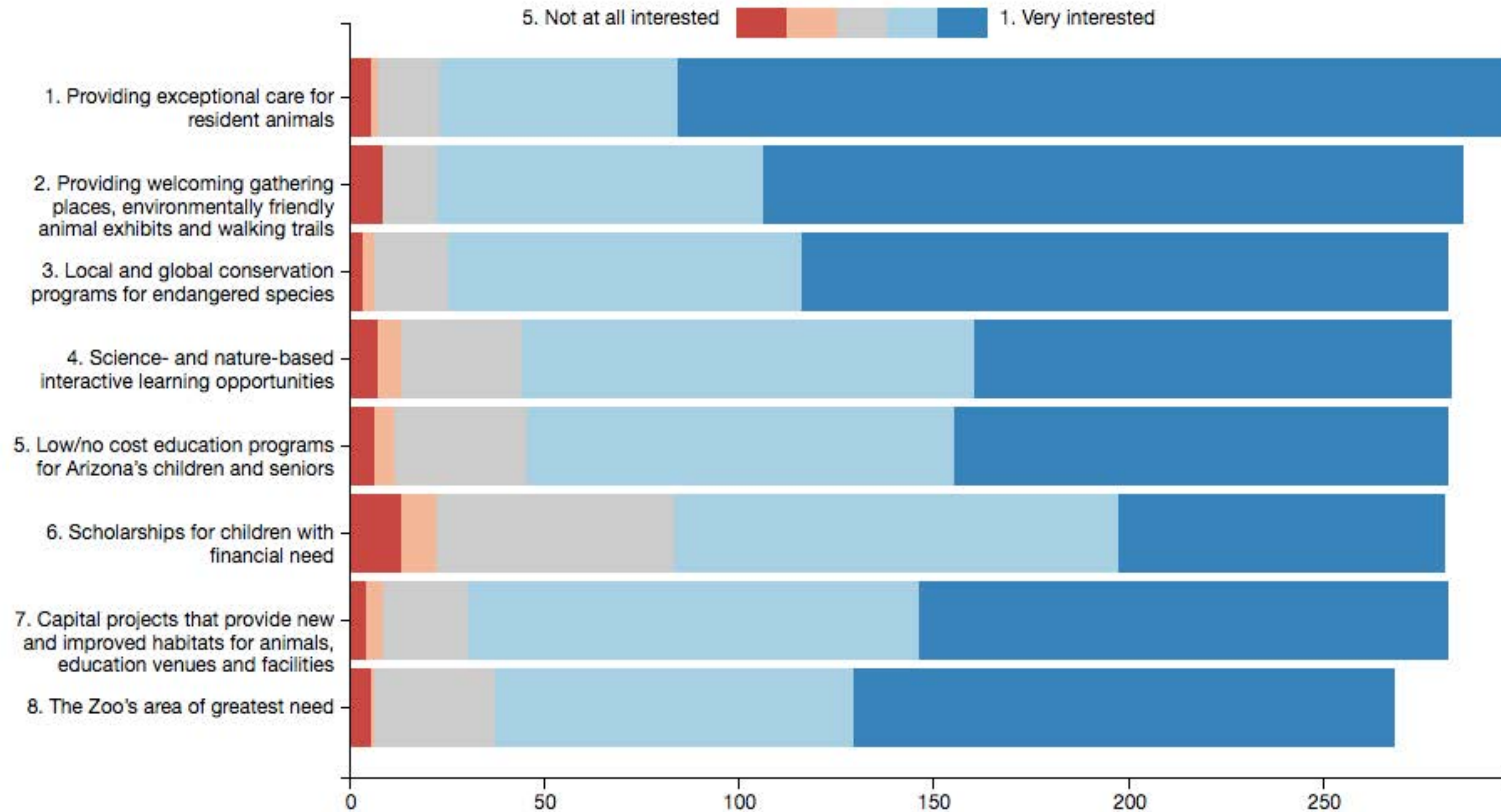
10. Many people like to leave one or more gifts to charity in their will. If you were to sign a will in the next six months, how likely would you be to include a gift to Best Friends?



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



2. Which best represents your LEVEL OF INTEREST in the following Phoenix Zoo funding priorities?



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.”





Thank you for being a top listener.

Hey it's Charles Kelley from Lady Antebellum.

You're getting this email because you are one of Lady Antebellum's top listeners on Spotify. Thanks so much for listening to so much of our music.

I'm going on a solo tour and as a way to say thank you I want you to be one of the first to get access to tickets.

The presale starts **Wednesday October, 14th at 10am** and runs until Thursday, October 15 at 10pm. You'll be able to purchase up to 6 tickets while supplies last. The password is **BELIEVER**

I have a new single out and would love for you to listen to it on Spotify. It's called "**The Driver**" and also features Dierks Bentley and Eric Paslay. Hope you like it!

[BUY TICKETS HERE](#)

You asked. We delivered.

[View in web browser](#)



NEW

alta HR THE WORLD'S SLIMMEST WRISTBAND WITH CONTINUOUS HEART RATE



Meet new Fitbit Alta HR™, the heart rate wristband that helps you reach your goals in style.

[PRE-ORDER NOW](#)

PurePulse® Heart Rate

Sleep Stages: Light, Deep, REM*

SmartTrack™ Auto Exercise Recognition

Interchangeable Bands**

*Coming soon with an app update.

**Interchangeable bands sold separately.

[#fitbitalta](#)

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Fitbit, Inc. — 495 Howard Street, Suite 500, San Francisco, CA 94103

HARRY'S



Try Our New Foaming Shave Gel And After Shave Moisturizer

Both were designed with over a year of formulating and testing, using feedback from you. Both offer superior hydration and moisture to combat dryness and irritation. Both are guaranteed to improve your daily routine.

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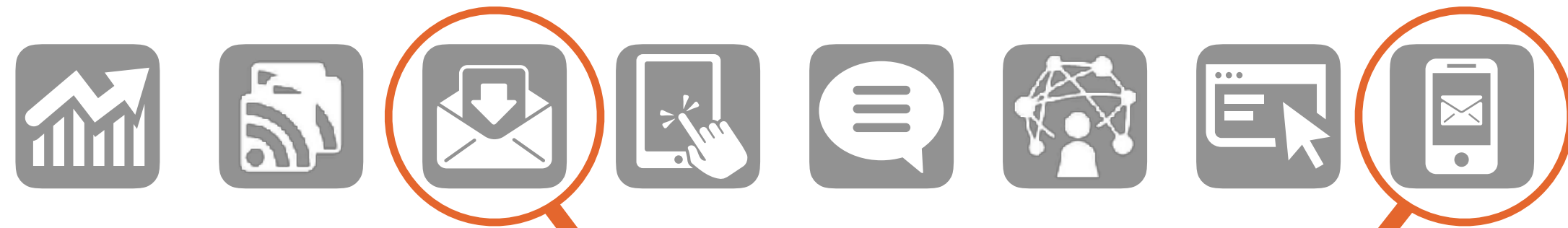


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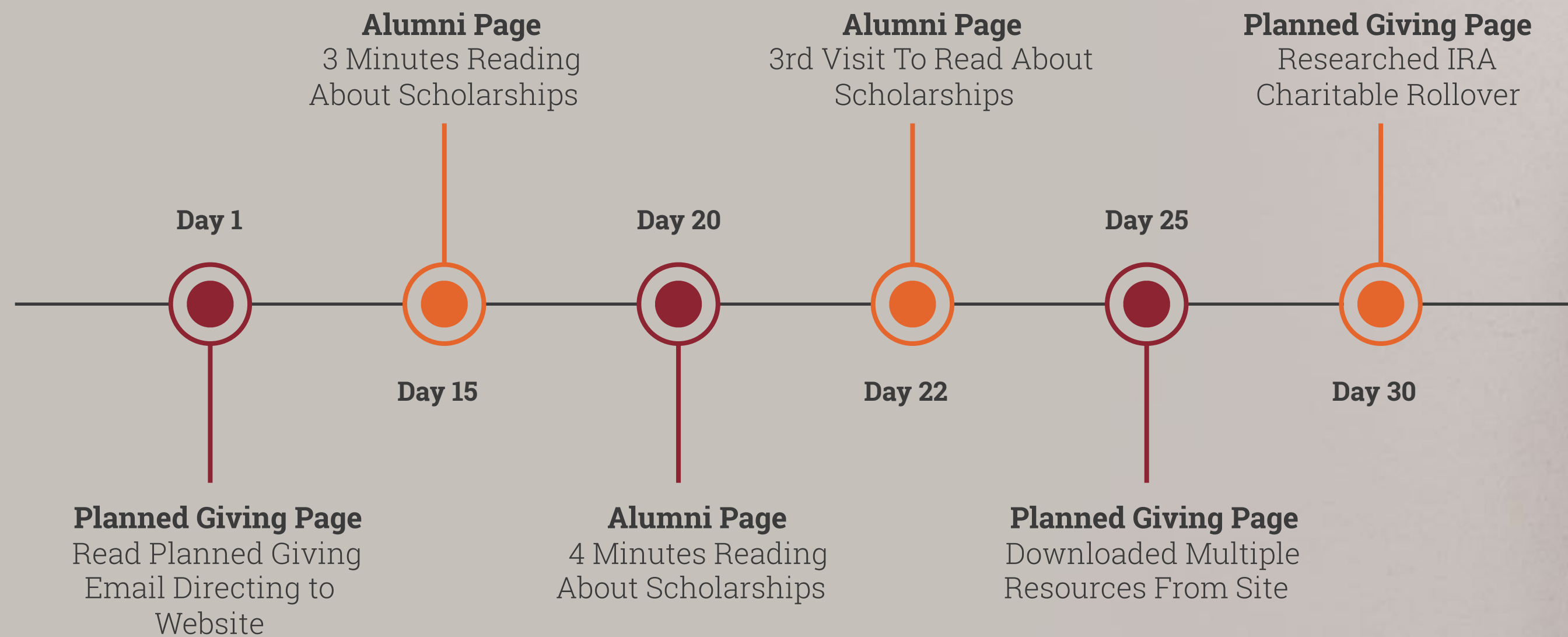


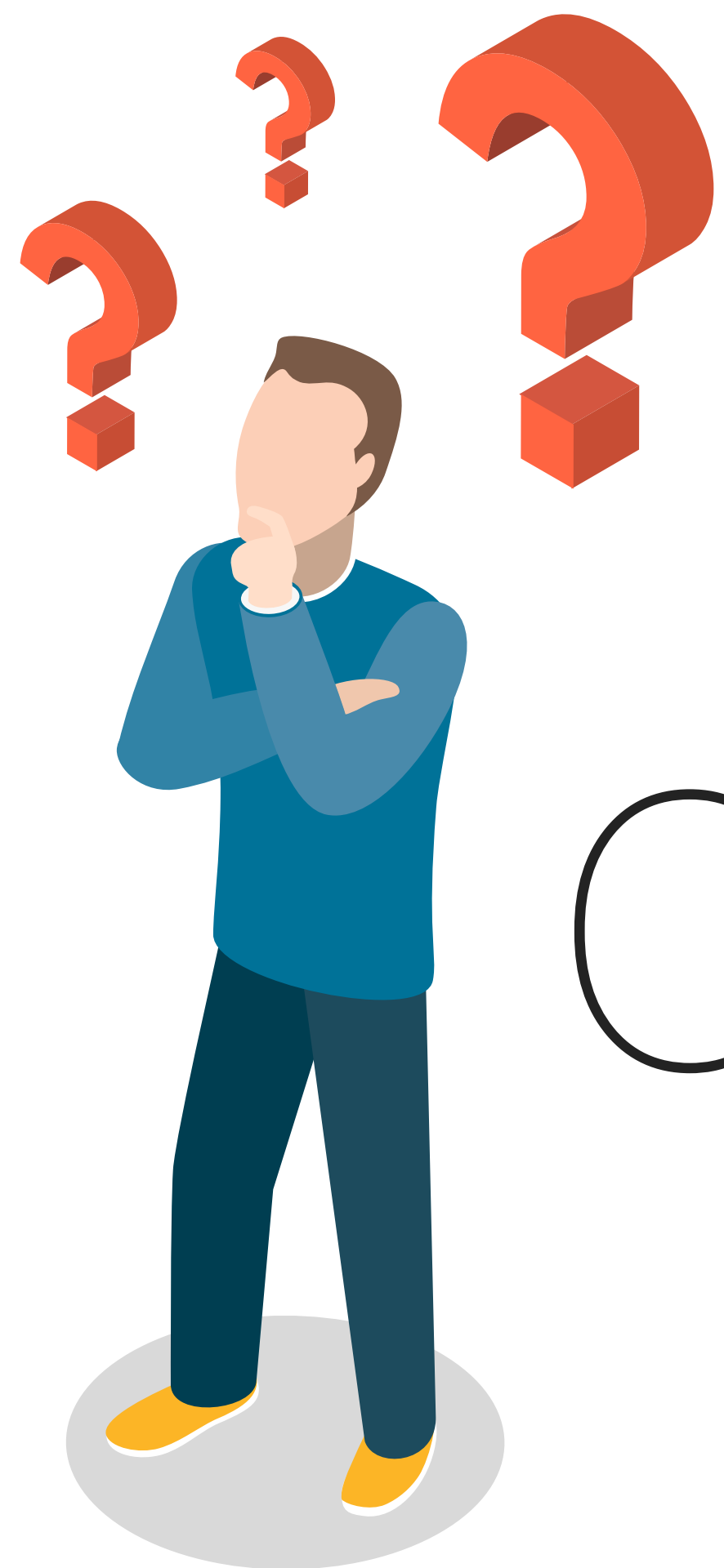
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Behavioral Marketing

Never Miss a Planned Giving Opportunity Again





Questions?

Samples

Samples

FIND THE PERFECT GIFT

Browse the gifts that qualify you for membership in the Eagle Heritage Society.

YOUR GIFT	HOW YOU MAKE THE GIFT	YOUR BENEFITS
<p>Your Will or Living Trust</p> <p>A Beneficiary Designation</p> <p>Retirement Plan Assets</p>	<ul style="list-style-type: none"> Work with your attorney to add a gift in your will or living trust detailing your donation to The Museum of Flight. Name the Museum as a beneficiary of a percentage of your retirement plan, savings account, brokerage account or life insurance policy. 	<ul style="list-style-type: none"> Maintain your current lifestyle while making a meaningful gift to support the Museum. Enjoy flexibility to change your plans as life changes. Pass your retirement plan assets to us tax-free.
<p>Stock or Other Securities</p> <p>Real Estate</p>	<ul style="list-style-type: none"> Give stock or securities that have increased in value directly to The Museum of Flight. Donate your residence, farm or commercial property. 	<ul style="list-style-type: none"> Qualify for income tax benefits. Avoid capital gains taxes on assets that have increased in value. Transfer the expense of insuring or maintaining assets you no longer need.
<p>Charitable Gift Annuity*</p>	<ul style="list-style-type: none"> Make a donation of cash or securities to benefit the Museum through a simple exchange for fixed payments for life. 	<ul style="list-style-type: none"> Qualify for an income tax charitable deduction. Receive fixed payments for life. What is left of your gift after your passing supports the Museum's future.
<p>Charitable Remainder Unitrust</p> <p>Charitable Remainder Annuity Trust</p>	<ul style="list-style-type: none"> You transfer cash, securities or other appreciated assets into a charitable remainder trust. The trust pays you either a variable (unitrust) or fixed (annuity trust) amount each year for a lifetime or a term up to 20 years. When the term is up, the balance goes to the Museum. 	<ul style="list-style-type: none"> Receive an income tax deduction for the charitable portion of your gift. Eliminate capital gains tax at the time of the gift when the trust is funded with appreciated assets.

*Charitable gift annuity amount variable is adjustable through all regulations. See contact us if you are interested in gift annuity.



Thank You

We cannot thank you enough for your support of the Museum throughout the years. Without our Eagle Heritage Society members, Lifetime and Charter members, donors, Trustees, staff and volunteers who have loyally and generously supported the Museum, we wouldn't be able to continue sharing the aviation story and inspiring future generations.



THE MUSEUM OF FLIGHT

9404 East Marginal Way, S.
Seattle, WA 98108
Tax ID#: 91-0785826

Sandra Delese, CFRE, CSPG
Planned Giving Program Manager
206-768-7199
sdelese@museumofflight.org

mof.planningyourlegacy.org

TAKING FLIGHT:
MAKE A GIFT FOR
THE FUTURE

As the Museum continues to grow, securing the future is more important than ever. Although we cannot know what will happen in the coming years, there is no time like the present to pause and reflect on the past and the people and events that brought us to this moment. **Please join us in looking to the future as a member of the Eagle Heritage Society.**

HOW CAN I JOIN THE ADVENTURE?

When the Museum of Flight began over 50 years ago as PNAHF (Pacific Northwest Aviation Historical Foundation), no one could have pictured the Museum as it is today.

The Museum was built on the passionate belief that the history of aviation and space should be preserved and shared. This dream of the Museum's founders has become an amazing reality as our mission continues to thrive. The success of the Museum over the years has been made possible by the vision and generosity of many people—like you!

We invite you to help bring the history of flight to life for future generations by extending your support for the Museum with a planned gift. When you include The Museum of Flight in your plans, you join a group of supporters who share your love for our cause. We call this inspirational group the Eagle Heritage Society.

To learn more about the Eagle Heritage Society, or for help determining what gift is right for you, please contact Sandra Delese, CFRE, CSPG, at sdelese@museumofflight.org or 206-768-7199. If you have already included The Museum of Flight in your future plans, please let us know. It would be our honor to thank you and officially welcome you into the Eagle Heritage Society.

Besides feeling good about your generous gift, as part of the Eagle Heritage Society, you'll also enjoy:

- Recognition in the Museum on the Eagle Heritage Society wall
- Listing in the Museum's annual report
- Invitation to the annual Society event
- Lapel pin and certificate just for you

How to Join

When you include a gift to the Museum in your future plans, simply let us know so we can thank you and welcome you into the Eagle Heritage Society. Your support may include:

- A gift in your will or living trust
- Naming the Museum a beneficiary of your IRA or other retirement account
- Charitable trusts, and more



A SIMPLE WAY TO GIVE

For many, the best way to remember the Museum is through a bequest in your will or living trust. Making this gift is easy, all it takes is one sentence. You don't part with assets today, and you have the flexibility to change your mind.

Share the language below with your estate planning attorney to include a gift to the Museum in your will or trust.

I give to The Museum of Flight Foundation, Federal Tax ID #91-0785826, ____% of the res., residue and remainder of my estate (OR the sum of \$____) for its unrestricted use and purpose.

Consider gifting a percentage of your estate or specific assets. That way, gifts to loved ones and to the Museum remain proportional—no matter how your estate fluctuates over the years.

SEE YOUR GIFT OPTIONS

SCHOLARSHIP TO PAVE WAY FOR PROMISING ENGINEERS AND SCIENTISTS

Continued from Page 1

could leave enough added income for our kids throughout their lives, and then we thought, let's put the capital back to our roots," Barbe says. "We're hoping we can make an impact, and help West Virginia students, even when we're no longer around."

Charlie is a 1954 graduate from the College of Business and Economics, and Barbe is a 1955 graduate from the Eberly College of Arts and Sciences. The two met on Halloween of 1952 at a WVU Wesley Foundation dance.

After graduating, Charlie joined the Army. He spent 17 months in Korea before returning to the United States and a career with Western Electric, starting in Chicago. Barbe also worked with Western Electric before having the first of their two children, Deborah and Steven. Then, in the post-kinder departure, she had a career as a proofreader for the U.S. government.

Charlie retired from Western Electric but has stayed active, teaching ski lessons for two seasons at Eldora Mountain Resort in Colorado. He is still an avid skier.

The Merediths currently reside in Boulder, Colorado, as "born again natives," and enjoy traveling and biking, riding anywhere from 4,000 to 6,000 miles every year. The couple, who recently celebrated 63 years of marriage, believe in the educational mission of WVU and urge others to make a lasting impact through their estate plans as well.

"This is the way to go," Barbe says. "Put the money to use when you're gone. You have to do it for the future."

With many students relying on financial aid and scholarships to attend WVU, your gift, like the Merediths', can make a lasting impact on our students' lives. To learn more about the many ways you can support WVU indefinitely, contact Matthew Clark at mclark@wvuf.org or 304-284-4033.

“

Our degrees did well by us, but our country is running behind many others in producing engineers and scientists. If we are going to keep up and hold our place in the world, we are going to need huge numbers of them. We want to do something that would have a lasting effect.”

CHARLES MEREDITH

WVU MEANS STUDENT SUPPORT

In our global community, the importance of higher education will only grow in the coming years. But for students attending West Virginia University, achieving this level of education means an ever-increasing reliance on scholarships.

We are committed to ensuring that no academically qualified student is turned away because they cannot afford to attend college. Each year, WVU offers over \$34 million in scholarships to more than 7,000 first-year students based on criteria such as academic merit, financial need, leadership, service and talent.

HERE ARE SOME OTHER NUMBERS TO PONDER.



\$19,000

AVERAGE AMOUNT OF STUDENT DEBT incurred by WVU graduates



70% WVU UNDERGRADUATES receiving some form of financial aid

\$1,000

MINIMUM PLEDGE

per year for 5 years

TO START A NEW NAMED ANNUAL SCHOLARSHIP



\$48 MILLION SCHOLARSHIP AID AWARDED BY WVU ANNUALLY

\$50,000

amount needed to create a NAMED GENERAL SCHOLARSHIP



CHARITABLE GIVING THAT MAKES SENSE

Avoid These Pitfalls

It may be impossible to live a mistake-free life, but these tips will at least cut down on miscues when it comes to charitable giving.

1. POOR RECORDKEEPING can create a hassle at tax time—and major headaches if you're audited by the IRS. Keep records of all charitable donations so you can reconcile your deductions if you are itemizing and substantiate your deductions in the event you are audited.

2. SELLING STOCK AND DONATING PROCEEDS directly to the West Virginia University Foundation is a good option if you've owned the stock for more than a year and it's increased in value. You eliminate capital gains tax and receive an income tax charitable deduction for the full fair market value, when you itemize. Exception: If it has decreased in value, sell the stock first, then donate the proceeds to the WVU Foundation. That way you can take the loss on your taxes and get a potential charitable deduction as well.

3. TRANSFERRING SAVINGS BONDS during your lifetime usually results in taxable income. But if you include a provision in your will to leave the bonds to the WVU Foundation, we redeem the bonds free of tax after your lifetime.

4. DONATING A COMMERCIAL ANNUITY during your lifetime may also result in taxable income. But if you name the WVU Foundation as beneficiary of a percentage of the annuity after your lifetime, we receive that portion of the annuity tax-free.

WE'RE HERE TO HELP

We'd be happy to discuss the benefits of making a planned gift and share some other giving options as well. Please contact Matthew Clark, Director of Planned Giving, at 304-284-4033 or mclark@wvuf.org to learn how you can lend lasting support to our cause.

United States and beyond.

The couple will fund the scholarship through a gift in their will and by naming the WVU Foundation as a beneficiary of a retirement account. "We knew we

Continued on Page 2

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](#)





It's Your Legacy. Explore It.

Wrap Up the Year With A Gift to Cal Poly

As you think about holiday gifts for family and friends, don't forget to consider a year-end gift to Cal Poly. Not only will our students and programs benefit from your generosity, but so will you.

Depending on the gift you make, you can:

- Reduce your income taxes.
- Increase your spendable income.
- Reduce or eliminate capital gains tax.
- Attain no-cost, worry-free asset management.

Make your gift by Dec. 31 and you will see a tax break for 2013 (when you itemize deductions on your federal income tax return).

Discover Your Giving Options

Popular year-end gifts include appreciated securities, life income gifts, retirement plan assets and real estate. To learn more about these and the many other ways to make a difference at Cal Poly, contact us today!



CAL POLY

SAN LUIS OBISPO

Cal Poly Planned Giving

800-549-2666 or 805-756-7125

plannedgiving@calpoly.edu

www.plannedgiving.calpoly.edu

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ns
yo

MAKE *Hope* A PRIORITY

Nothing can be more important than sharing the story of hope. That's why, when you name ABWE in your will or living trust, you're taking a simple — yet life-altering — step toward serving the world with love.



GET STARTED

Contact Kevin Kurtz, Director of Planned Giving, at 800.921.2293 or Kevin.Kurtz@abwe.org for your FREE planning guide *Make Your Final Wishes Come True*, where you'll learn how to help ABWE change lives with the gospel while ensuring your loved ones will be cared for.



abwe Planned
FOUNDATION Giving



U.S. OLYMPIC
AND PARALYMPIC
FOUNDATION

Maggie
Vermont
Speed Skating



Help Her Dreams Take Flight
Use Your Will to Support Future Olympians

Photo by Dean Mouhtaropoulos/Getty Images

A CHARITABLE PLANNING GUIDE FOR ISU ALUMNI AND FRIENDS | FALL 2017

FOREVER TRUE FOR IOWA STATE

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 provide a great experience for every employee, coworker or guest I work with. Scholarships like the Anne Shaner Hotel and Institution Management Award allow me to fully immerse myself in hands-on experience at Iowa State. "The field I have chosen to study is not just a job, I know I will make lots of money but I'm passionate about it. Scholarships enable me to pursue my studies without worrying about my finances. I'm thankful to donors for making attainable education possible!"

Inside This Issue

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



Passing It Forward

One of Anne Shaner's most

memorable experiences at Iowa State University was working as chairperson of the annual cherry pie sale. It was a full operation to manage students taking thousands of slices made from scratch. "You had crates that came in from the farm — that you had to make and deliver for the pie sale and then place in the shelves in the lobby," explained Shaner, a 1957 graduate. The cherry pie sale began in 1950 to raise money for the home economics club. That first year, students sold 2,000 pies, which required 80 pounds of flour, 80 pounds of shortening, 30 gallons of cherries, 80 pounds of sugar, 15 pounds of cinnamon and 66 boxes of pie crust. In the '50s, Shaner's team sold 17,000 pies.

Overseeing the student-run sale was good practice for her upcoming career. After working for food and beverage management — a precursor to the hospitality management program — the Iowa native headed to Rochester, New York, for a year-long internship at the Ritz-Carlton Hotel, where she helped serve 25,000 meals a day to the employees of the film and camera company. It was former Iowa State University instructor Carolyn Casson who helped Shaner land her first job assisting in food service management at the Ritz-Carlton. "My college teacher had gone to Rice University at the end of my junior year," Casson explained. "She called me and asked if I would like to work for her."

FOREVER TRUE FOR IOWA STATE

Dear Friend of Iowa State,

Your dedication to making a gift to Iowa State and its foundation is commendable. Thank you for your generous and thoughtful planning for the future. We will be sure to take your gift to the next level.

As we approach the one-year mark since we launched Forever True for Iowa State — our most ambitious and transformative campaign ever — I am grateful for the extraordinary support it has received from our alumni and "Worlds Together" donors. Your support is making a difference in the lives of our students, faculty and staff, and it is a privilege to work with you. We are excited to see how your gift will help us continue to make a difference in the lives of our students.

In this issue of *Insights*, we connect the dots between your gift and the impact it will have on the lives of our students. We also share the story of how the Anne Shaner Hotel and Institution Management Award was created and how it will help us continue to make a difference in the lives of our students.

If you have ideas for how we can better serve you or your family, please contact us at giftplanning@iastate.edu or call 515-281-3575. We are happy to help you make your gift to Iowa State a reality.

Our office is happy to answer any questions you may have about the impact of your gift to Iowa State and how we can help you make your gift to Iowa State a reality.

Best regards,

 Paul Klasek
 Director of Development
 515-281-3575

P.S. Our website, iastate.edu/giftplanning, provides convenient resources and tools to help you make your gift to Iowa State a reality.

IOWA STATE UNIVERSITY FOUNDATION

Create Your Legacy at Iowa State

Simply check the boxes that describe you and return this survey in the enclosed envelope today.

I would like the complimentary guide, *Give From the Heart With a Tribute Gift*, so that I can learn more about making a gift that honors a loved one.

I want to make a gift to Iowa State because it has been important in my life. Please contact me to discuss my options.

I have already included a gift to the Iowa State University Foundation in my estate plan but haven't yet notified you. My gift is in honor of:

Name _____ Relationship _____

Name - Please print _____

Address _____

City, State _____ ZIP _____

Telephone _____

FOREVER TRUE FOR IOWA STATE

Give From the Heart With a Tribute Gift

Iowa State

gave me a good education, and now I can help give to someone else.

— ANNE SHANER



FUN FACTS Cherry Pie Sale

- In 1950, food preparation instructor V. Birch Blaney suggested baking and selling cherry pies to raise money for the home economics club.
- Students started the pie sale in honor of George Washington, who was known for cutting down a cherry tree and whose birthday was in February, the month the first sale was to take place.
- First made as a Shiner pie, the dessert was switched to a tart form in the '80s.
- The pies were topped with ice cream until World War II, when food rationing decreased the use of whipped cream in pies.
- The approximate amount of cherries that are used in the cherry pies every year is about 300,000 pounds. The reason is about 150 gallons of cherry filling.

The Sweet Taste of Charitable Giving

When you give to the Iowa State University Foundation this year, Iowa State and its students benefit from your generosity. And the cherry on top? You benefit, too.



Benefits for Iowa State: Few classes in the world are so personal and so important as those that help shape the lives of our students. By making a gift to the Iowa State University Foundation, you'll help improve lives across campus and around the globe. Your gift will strengthen Iowa State's long-term mission and enhance the Iowa State experience for this and future generations of students.

- Benefits for You:** Depending on the gift arrangements you choose, you may reap one or more of the following benefits:
- Reduce your income taxes
 - Increase your spendable income
 - Reduce or eliminate capital gains tax
 - Retire tax-free, worry-free asset management

To discover smart giving options that benefit you and Iowa State University, contact the office of gift planning today to start a conversation.

Targeted Email

Be. one 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 70821

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

[VIEW ONLINE](#)

Educational Email

Support for K-State [Unsubscribe](#)



KANSAS STATE UNIVERSITY
FOUNDATION
BOLDLY ADVANCING K-STATE FAMILY



Dear John,

Like Deb and George Shuck — whom you'll read more about below — **you've shown your love for K-State family** by making a gift for the future of Kansas State University. It's because of your generosity that we are able to make a difference for future K-Staters and, honestly, we couldn't do it without you.

Meet the Shucks and read about all the incredible ways this devoted couple is supporting K-State. Like you, their gifts have created a lasting impact that's impossible to measure.

For all the love you've shown for the K-State family, thank you. We are grateful for your support.

With Purple Pride,
Ben Johnson
Senior Director of Gift Planning

Sharing the love across K-State

Deb and George Shuck have long supported K-State. From scholarships to the Library and to the College of Business, they're giving back in so many ways.

[Read more](#)