

BLENDED ASKS AND SECURING PLANNED GIFTS

FFE Road Warrior 201
Solicitation Part 2
May 14, 2021
Presented by Trek Advancement

LEARNING OBJECTIVES



DEMYSTIFY
“PLANNED GIFTS”



BLENDED GIFTS
DEFINED



BLENDING
STRATEGIES

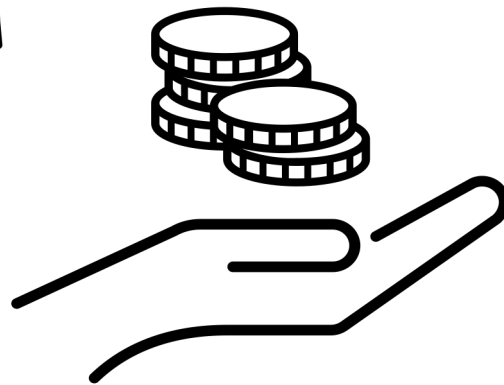


LEARN FROM
REAL CASE
STUDIES



DISCUSS FOR
APPLICATION

PLANNED GIFTS



WHY BLEND? WHY NOW?

Meet donors **where they are** – not where you are

Donors are focused on **supporting and sustaining** the individuals and organizations that mean the most to them

Ability to meet the **greatest needs** and **emerging opportunities** → NOW AND LATER

Dollars today allows for **adaptability** so that the mission can meet this moment in time

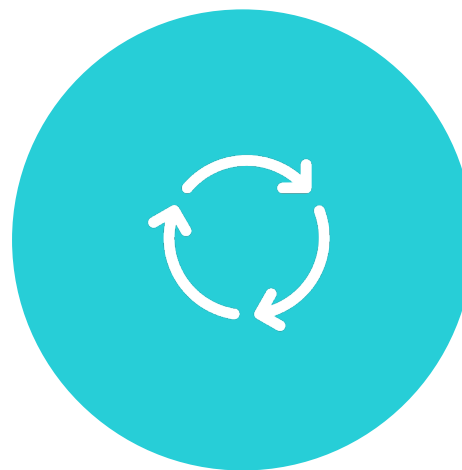
Deferred gifts provide for long-term **resiliency** that allow the mission to endure

Raise **donor sights** and be truly donor centered

DEFINITION OF “BLENDED GIFTS”



CASH + OTHER ASSET
(NOW + NOW)



CASH + DEFERRED GIFT
(NOW + LATER)



INDUSTRY BEST PRACTICES AND STANDARDS

CGP Standards Promoting Blended Gifts

CGP Reporting and Counting Charitable Gifts

CASE Reporting Standards and Management Guidelines

TYPES OF GIFTS

**Outright
Gifts**

**Irrevocable
Deferred
Gifts**

**Revocable
Deferred
Gifts**

TYPES OF OUTRIGHT GIFTS



CASH



PLEDGE



MARKETABLE
SECURITIES/ STOCK



QUALIFIED CHARITABLE
DISTRIBUTIONS FROM
RETIREMENT ASSETS



OTHER UNIQUE ASSETS

TYPES OF IRREVOCABLE GIFTS

LIFE INCOME
GIFTS

OWNER &
BENEFICIARY OF
LIFE INSURANCE

PLEDGE
AGAINST THE
ESTATE

TYPES OF REVOCABLE GIFTS

BEQUEST

BENEFICIARY DESIGNATION

CONDITIONAL PLEDGE

BLENDED GIFT SOLICITATION STRATEGIES

Now and now → combination of cash + unique asset

Now and later → outright cash/pledge + deferred

2nd gift to endow (or grow) first → lifetime gift, then deferred to endow it

Endow your annual gift → loyal lifetime, ask to “endow” annual support

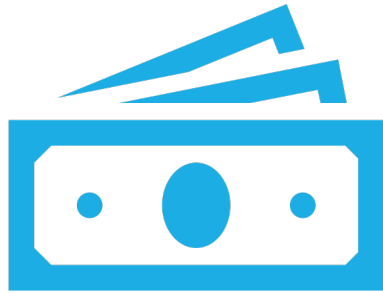
Later then now → existing deferred gift, ask to make major/special gift

- **Accelerate future gift** → existing deferred gift, ask to start funding to initiative / program today
- **Virtual endowment** → deferred gift in place first, ask to advance “spend” (annual)

Three part ask → outright cash/pledge (annual) + outright gift with cash/assets (major) + revocable or irrevocable deferred (planned/ estate)

NOW + NOW

“BLEND OF ASSETS”



Cash gift



Unique asset gift

NOW AND LATER

“DOUBLE ASK”


Make an outright gift now (cash or pledge) annual or major/special

AND

Make a deferred commitment either revocable or irrevocable

2ND GIFT TO
ENDOW OR
GROW 1ST
“FOLLOW UP ASK”

Existing fund (expendable or
endowed) established via
major/special outright gift during
lifetime (inter vivos)



Ask for a deferred gift to grow
the first either add to or start an
endowment (testamentary)

ENDOW YOUR ANNUAL GIFT

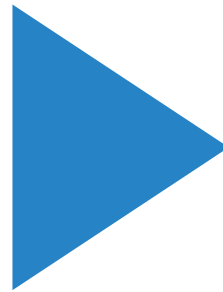
“DEFERRED ASK BASED ON GIVING BEHAVIOR”

Continue to
make loyal
annual gifts

Endow
annual
support via
deferred
gift

LATER THEN NOW

Deferred
gift
already
known



Ask for
major /
special
gift now

ACCELERATE
FUTURE GIFT/
MAKE
REVOCABLE
IRREVOCABLE
“URGENT NEED”

Revocable deferred
gift already exists



Ask for a inter vivos
gift to start a
funding today
(subtract from
deferred amount)
or make it
irrevocable

VIRTUAL ENDOWMENT

“ACCELERATE SPEND”

Existing deferred gift to endow a particular program (scholarship/ leadership) →
Advance the “spend” with annual gifts but keep deferred gift intact



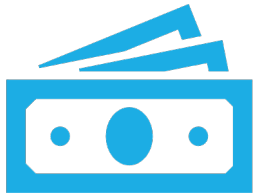
\$50k



\$2,500

NOW + NOW + LATER

“THREE PART ASK” / “TRIPLE ASK”



Outright cash/ pledge
(annual/ recurring)



Outright and/ or pledge gift with
cash/ assets
(major/ special)



Revocable or Irrevocable deferred
(planned/ estate)

DONOR CUES AND CLUES TO BLEND

“Not a good time, planning to retire”

“Have to pay for child’s/grandchild’s education”

“Worried about running out of money”

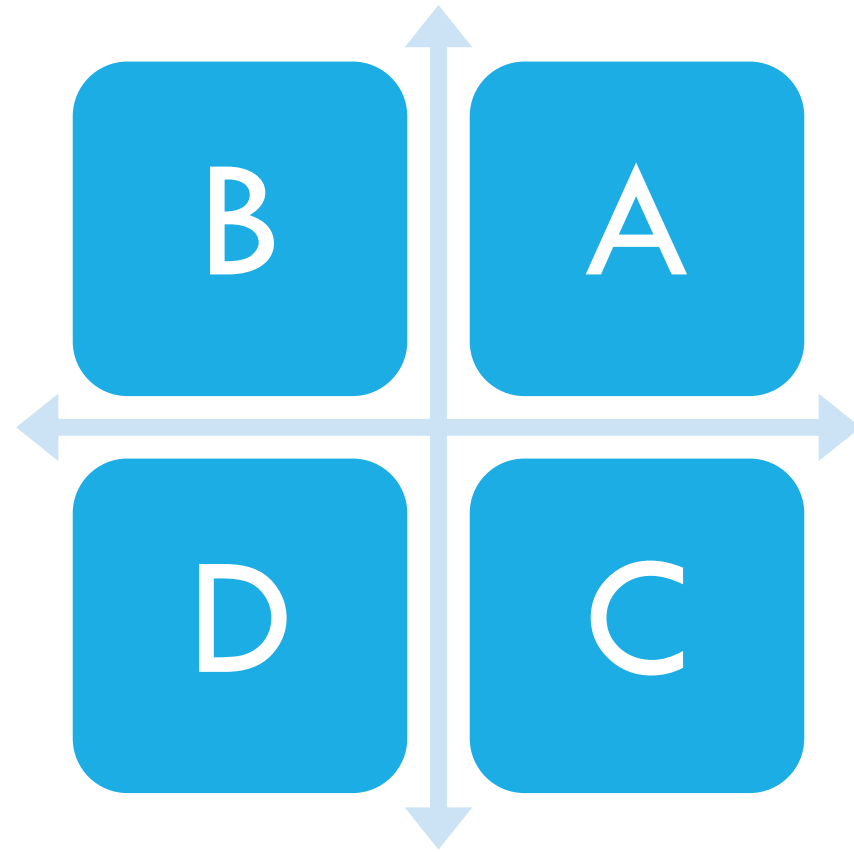
“Not a good time to make a gift”

“Focused on selling a business”

“Not enough money to make a gift”

“I wish I could do more”

WHO COULD AND SHOULD BLEND



THREE PART ASK



LATER → NOW / USE OF DONOR ROLL

 LEADING
WITH *heart*

APPLICATION

Have a strategy in mind and plan to share stories of what other donors have done and are doing to support organization/ campaign

Utilize permission marketing for donors to pick up (or not)

- Example: *“I recently worked with a loyal donor who signed a new will that one day will endow our fraternity grant. It was a really rewarding gift to work on with her and benefits our organization in a significant way”*

Direct ask

- Example: *“You have informed us of your generous gift to establish an endowed scholarship through your estate. Thank you! You may not be aware, but many of our donors make annual gifts of an amount that would be the same as the current spend off the endowment fund to provide a current scholarship to benefit a student today. If you were to do so, you could experience the joy of meeting a student who will benefit from your generosity and help that student understand how important our fraternity has been to you.”*

Listen for cues and clues

APPLICATION

1. As you participated in this session what concepts or ideas jumped out at you?
2. What intrigued you? What worried you?
3. What questions did this session raise for you?
4. What do you need to do to implement these concepts or ideas?

SUMMARY



NOW



LATER

THANK YOU!

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