Getting to First Base: Insights Into Marketing Your Gift Planning Program

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What is Gift Planning?

Gift planning involves helping philanthropic individuals make larger gifts than they could make from their income alone. A planned gift is a significant gift, made in lifetime or at death, as part of a donor’s overall financial and estate planning. Gift planning uses estate and tax planning techniques to help donors provide for charity and their loved ones/heirs in ways that maximize the gift and the donor’s potential tax savings and minimize the impact on the donor's estate.
Why Gift Planning?

Gift planning expands the giving opportunities that are available to those who believe in the mission of your organization.

- Did you know that only 5% of the wealth in this country is held in cash? The other 95% is held in non-cash assets.
Gift Planning Questions

• **When To Give?** Either now, later, or both. “Later” is often at death.

• **How To Give?** For example, outright gifts, gifts that provide a life income or benefit to person(s), gifts that give income to the charity, bequest, or beneficiary designation.

• **What To Give?** For example, cash, stock, closely held business interests, real estate, art, life insurance, retirement plan.
What Can UT System Accept?

- Cash
- Securities
- Bank Account
- Investment Accounts
- Retirement Plan
- Life Insurance
- Real Estate
- Oil, Gas, Mineral Interests
- Closely held business interests
- Intellectual Property
- Artwork & Collectibles
- Personal Effects
Focusing Our Efforts for Maximum Success

- Bequests and trusts
- Retirement plans, life insurance, bank and brokerage accounts
  - All of these only require a beneficiary designation
  - IRA Rollover gifts
- Life income plans
  - Charitable gift annuity and Charitable remainder trust
- Special opportunities
  - Upcoming changes to tax laws or gift annuity rates
Marketing Your Gift Planning Program

Personal visits

- Your best prospects are loyal donors

“We have found that people like you who love UT and have been such loyal donors over the years have often included us in their estate plans. Is that something you’ve done or would be willing to discuss?”
Marketing Your Gift Planning Program

• Website
  – Include bequest language and ways to make planned gifts

• Newsletters
  – Donor stories showing impact of planned gifts
  – Links to gift planning site

• Printed materials
  – Brochures, one pagers on current topics
Use your leadership to set an example
Use Your Annual Giving Program to Discover Planned Gift Prospects

- Loyal annual donors are your best planned giving prospects
- Add gift planning to your online giving form.
- Add a question or two about planned gifts to your annual giving call script.
Add planned giving request in gift acknowledgement letters.
QUESTIONS?

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We make a living by what we get, but we make a life by what we give.

Winston Churchill