

# 9<sup>TH</sup> ANNUAL PLANNED GIVING SYMPOSIUM

PLENARY SESSION

*Know Your Role in the Planned Giving Ask:  
A Case Study Perspective*

Planned Giving Council of Northeast Florida

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Michael Elias / Brian Wodar

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# SYMPOSIUM PRESENTATIONS

- Investment Decisions Aligned with Mission & Values
- Beginning your Planned Giving Program
- Prospect Research
- Unlocking the 990
- Organizational Readiness
- Blended Gifts
- Balancing Family Needs with Philanthropic Goals

# KNOW YOUR ROLE IN THE PLANNED GIVING ASK: A CASE STUDY PERSPECTIVE

- Your Personal Legacy
- Personal visit experiences describing the dynamics of the Donor, Development Officer, and Estate Planning Professionals.
- Pair Up Exercise: What have you learned from the Symposium?
- Case studies allowing you to play the role of:
  - Donor,
  - Development Officer, or
  - Financial Advisor / Estate Planning Attorney.

# YOUR PERSONAL LEGACY

- Stand Up
  - Stretch & Share a Personal Hobby or Interest
- Sit Down:
  - Who has gone before you that left a Legacy?
    - For your church, your school, or your organization.
    - What Legacy gifts made these organizations possible?
- What will be your Legacy for your organization?
  - Describe what future legacy you are creating!
- Stand Up
  - Pick a partner and tell your story.

WELCOME TO:

Identifying Legacies

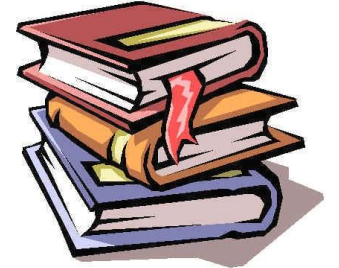
Donor Visit  
Experiences

Realizing What  
You've Learned

Role-Playing Visit

LEGACIES

ROLE-PLAYING



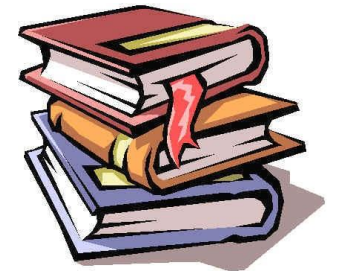
STORIES &  
EXPERIENCES

FOR

PLANNED  
Giving

# STORIES, EXPERIENCES & LEGACIES

- Farm Land CRUT (“The Farm Manager”)
- Montana Rancher Cash & Bequest



STORIES &  
EXPERIENCES

# DISCUSSION “PAIR UP”

Apply what you learned from the symposium today.



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1. How do you generate planned giving leads for your organization?
2. How can you improve your working relationship with your donors' advisors?
3. From what you have learned today, what statistic, advice or suggestion will be most helpful in your planned giving role for your organization?
4. For you, what has been the most effective way to close a planned gift?

# WHAT HAVE WE LEARNED?

# ROLE PLAYING EXERCISE

- INSTRUCTIONS
  - Play Your Role
    - Donor(s)
    - Development Director
    - Financial Advisor Observer
- GROUP REPORT OUT
  - One or Two Responses

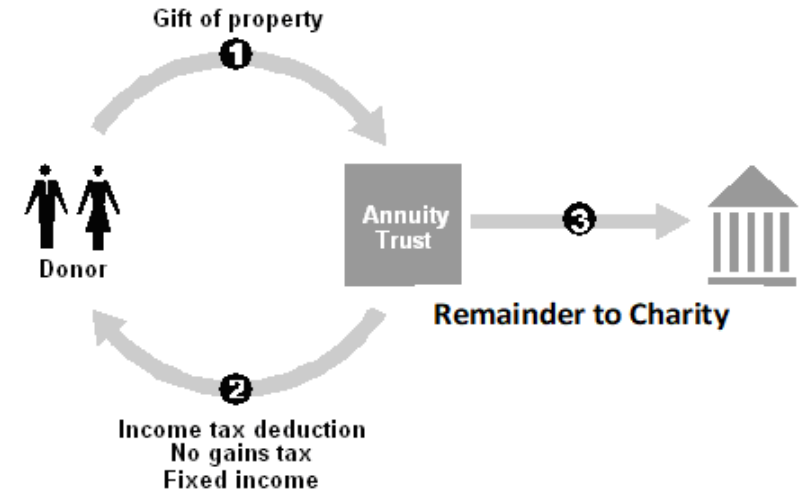
ROLE-PLAYING



# STORIES, EXPERIENCES & LEGACIES

Presented by:  
Michael Elias

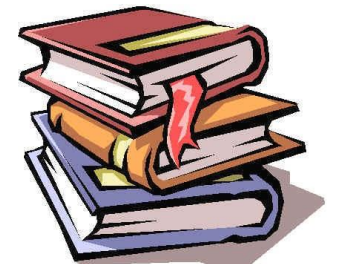
- **Ruth Bell – a true original**
- Partners:
  - OHB
  - PJS
  - CPA
  - Trust Attorney
- Structure:
  - Term 15 years
  - \$500,000 Cash
  - \$1,900,000 Real estate (FMV)
  - IRS Discount Rate 4.2%
  - Annuity Trust Payout \$178,000
- **Stewarding Ruth’s gift**



# STORIES, EXPERIENCES & LEGACIES

PRESENTED BY:  
BRIAN WODAR

- Motivated Donor Needing Gift Structuring

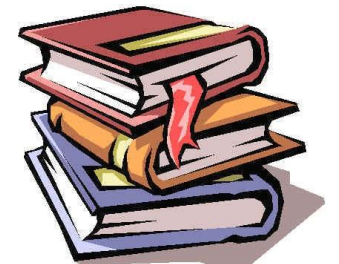


STORIES &  
EXPERIENCES



# STORIES, EXPERIENCES & LEGACIES

- School Site Land Gift (“The Widow”)
- The “I Use Woolite” Bequest



STORIES &  
EXPERIENCES

# Observations & Questions

Paul J. Strawhecker, MPA, ACFRE

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Michael Elias / Brian Wodar



12/02/2019



Paul J. Strawhecker, Inc.  
Resource Development and Counsel for Nonprofits

# PLANNED GIVING INTERVIEWS

1. Wait & See Person
2. Not Ready / Ready
3. Interested, but hadn't thought about it yet.
4. Experienced in making planned gifts.
5. The Four P's
  - People
  - Property
  - Plans
  - Planners

# PROSPECT INDICATORS

1. Interest in the organization or cause.
2. Giving for 10 years or longer.
3. Over the age of 60.
4. Solving a financial problem (or tax issue).
5. No (or few) kids.
6. Wealth!



# FINDING PROSPECTS ON YOUR DONOR BASE

- Understanding who is on your list.
  - Are there Planned Giving Prospects?
  - If so, who are they?
  - How do I follow up with them?



# PROSPECTING

- Mass Mailing Statistics
- Estate Seminar Statistics



# SAMPLE STATISTICS AND REPORT



Donor Search Sample Screening Results

First	M	Last	DS Rating	Overall	Profile	RFM Total	Last Gift Date	Total Gift Amount	# of Gifts	Age	Founda- tion	Fnd Corpus	Largest Gift High	PGID
			DS1-1	20.4	IDP	266	04/09/2013	\$2,350	10	55		\$0	\$49,999	2
			DS1-1	20.2	IDP	110	09/09/2010	\$400	2	55	Y	\$0	\$100,001	7
			DS1-1	20.2	IDP	176	11/12/2009	\$40,000	4	55	M	\$0	\$5,000	7
			DS1-1	20.1	IDP	275	04/01/2013	\$200,200	8		Y	\$17,269,438	\$24,999	3
			DS1-1	20.1	IDP	135	12/31/2012	\$150	2			\$0	\$2,000,000	7
			DS1-1	19.9	IDP	27	05/11/2009	\$100	1			\$0	\$24,999	7
			DS1-1	19.9	IDP	252	05/20/2013	\$10,716	5			\$0	\$5,001	5
			DS1-1	19.8	IDP	77	07/06/2008	\$1,500	1			\$0	\$5,000	7
			DS1-1	19.7	IDP	291	06/28/2013	\$16,083	18			\$0	\$9,999	2
			DS1-2	21.1	IDP	47	11/20/2010	\$100	1	55		\$0	\$1,000	7
			DS1-2	20.9	IDP	156	01/20/2009	\$50,000	3	35		\$0	\$1,000	7
			DS1-2	20.8	IDP	29	07/20/2009	\$100	1	35		\$0	\$1,000	7
			DS1-2	20.6	IDP	167	11/08/2012	\$425	4	63		\$0	\$499	5
			DS1-2	20.5	IDP	40	04/02/2010	\$100	1	63		\$0	\$499	7
			DS1-2	20.4	IDP	221	09/06/2012	\$21,200	5	63		\$0	\$2,600	5
			DS1-2	20.3	IDP	139	03/04/2013	\$140	2			\$0	\$30	7
			DS1-2	20.3	IDP	84	03/30/2010	\$200	2			\$0	\$0	7
			DS1-2	20.2	IDP	112	12/26/2006	\$700	4		M	\$0	\$0	7
			DS1-2	20.2	IDP	240	12/31/2012	\$875	11	63		\$0	\$100	2
			DS1-2	20.2	IDP	149	12/13/2011	\$700	3	63		\$0	\$1,400	7
			DS1-3	20.2	IDP	171	12/19/2012	\$475	4	63		\$0	\$499	5
			DS1-3	19.7	IDP	257	09/19/2012	\$14,600	15	57		\$0	\$1,000	2
			DS1-3	19.7	IDP	138	01/07/2013	\$175	2			\$0	\$2,499	7
			DS1-3	19.3	IDP	85	09/12/2012	\$200	1			\$0	\$500	7
			DS1-3	19.2	IDP	113	12/31/2012	\$250	1			\$0	\$2,499	7
			DS1-3	19.1	IDP	19	12/08/2008	\$100	1			\$0	\$2,499	7
			DS1-3	18.8	IDP	179	05/08/2009	\$100,000	5			\$0	\$2,500	5
			DS1-4	21.0	IDP	224	12/31/2012	\$750	8	57		\$0	\$499	4
			DS1-4	21.0	IDP	176	06/21/2012	\$600	6	83		\$0	\$1,000	6
			DS1-4	20.8	IDP	171	01/28/2013	\$300	3	83		\$0	\$1,000	7
			DS1-4	20.5	IDP	152	12/09/2009	\$20,000	2	83		\$0	\$2,499	7
			DS1-4	20.4	IDP	165	09/20/2010	\$1,500	4			\$0	\$200	5
			DS1-4	20.3	IDP	106	12/28/2011	\$200	2			\$0	\$1,000	7
			DS1-5	21.5	IDP	149	09/12/2012	\$250	4			\$0	\$0	5
			DS1-5	20.8	IDP	129	08/30/2012	\$230	3			\$0	\$499	7
			DS1-5	20.8	IDP	87	08/26/2008	\$2,500	1			\$0	\$0	7
			DS1-5	20.3	IDP	208	12/31/2012	\$305	9	77		\$0	\$0	4

# HINTS

- Development Audit
- 3-Year Plan
- Be Consistent
- Be Systematic
- Ramp Up

