

## WAYS TO BLEND

Anna Maria Eades | Senior Director, Office of Estate & Gift Planning



# Agenda

- UF Going Greater
- Estate & Gift Planning Team
- Why do people give?
- What are Blended gifts?
- Real life examples
- Q&A



## Go Greater Campaign

- \$3 billion
- Launched in the fall of 2017
  - Silent phase July 2015-fall of 2017
  - Campaign ends Fall of 2022
- Raised \$1.9B through January – 63% of goal
- 1/3 (\$1billion) should be comprised of Planned Gifts
  - Raised \$585,901 – 58% of goal

# Estate & Gift Planning Team



**Paul M. Caspersen, CFP®, MS**  
Assistant Vice President  
Sr. Philanthropic Advisor  
[pcaspersen@uff.ufl.edu](mailto:pcaspersen@uff.ufl.edu)  
352-392-5513



**Anna Maria Eades**  
Senior Director  
[aeades@uff.ufl.edu](mailto:aeades@uff.ufl.edu)  
352-392-5405



**Michael Sopko**  
Director  
[msopko@uff.ufl.edu](mailto:msopko@uff.ufl.edu)  
352-846-0925



**Andrea K. Fourman, JD**  
Director  
[afourman@uff.ufl.edu](mailto:afourman@uff.ufl.edu)  
352-392-5514



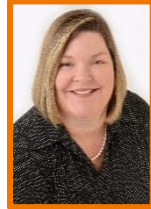
**Alex Cobb, JD, LL.M.**  
Director  
[acobb@uff.ufl.edu](mailto:acobb@uff.ufl.edu)  
352-392-9532



**Rachel Dorman**  
Associate Director  
[rdorman@uff.ufl.edu](mailto:rdorman@uff.ufl.edu)  
352-392-8068



**Fred Rowe**  
Director of Real Estate  
[frowe@uff.ufl.edu](mailto:frowe@uff.ufl.edu)  
352-846-2325



**Julie Price-Trickey**  
Gift Planning Associate  
[jpricetrickey@uff.ufl.edu](mailto:jpricetrickey@uff.ufl.edu)  
352-392-5512



**Shirl Raulerson**  
Administrative Assistant II  
[sraulerson@uff.ufl.edu](mailto:sraulerson@uff.ufl.edu)  
352-392-8156

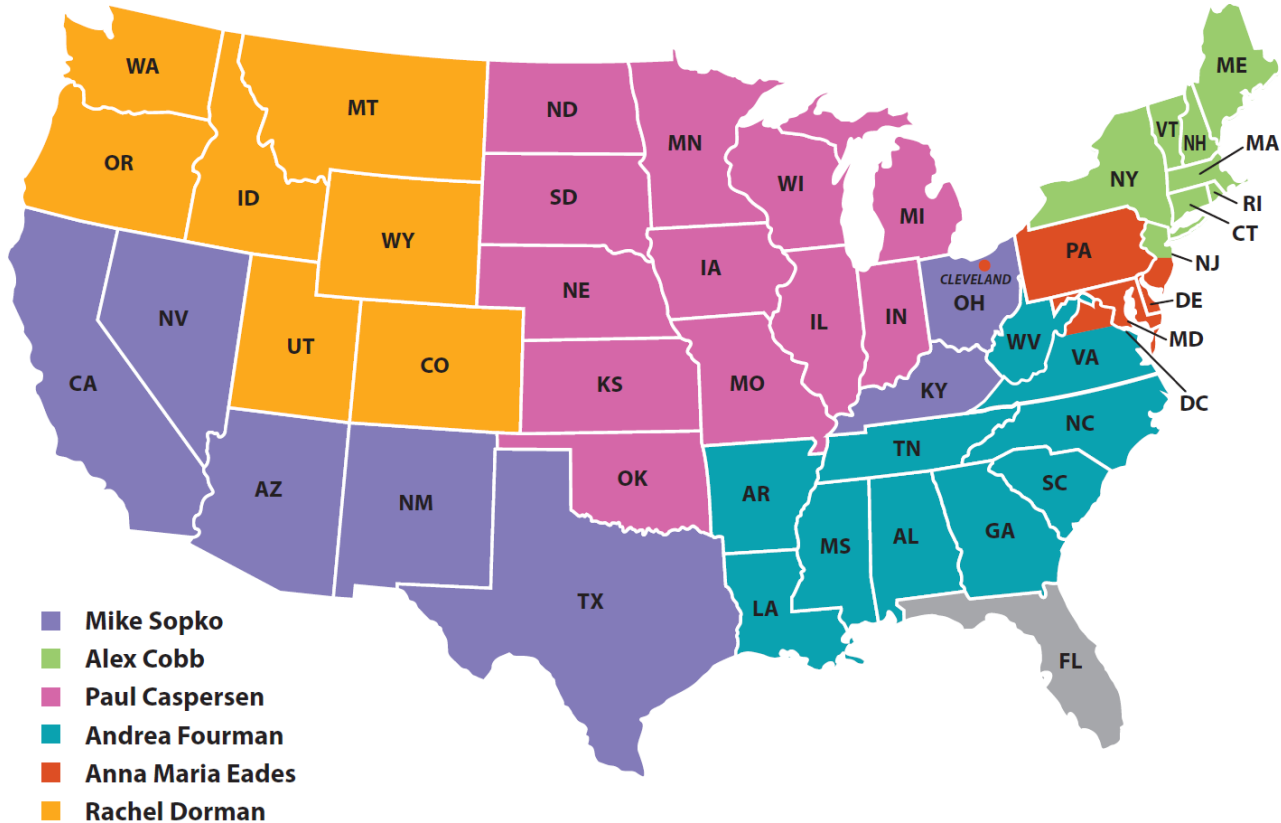


**Kelly Royston**  
Administrative Assistant  
[kroyston@uff.ufl.edu](mailto:kroyston@uff.ufl.edu)  
352-392-0097



**Bussey Quackenbush**  
Marketing Specialist  
[bquackenbush@uff.ufl.edu](mailto:bquackenbush@uff.ufl.edu)  
352-392-9534

# Territories



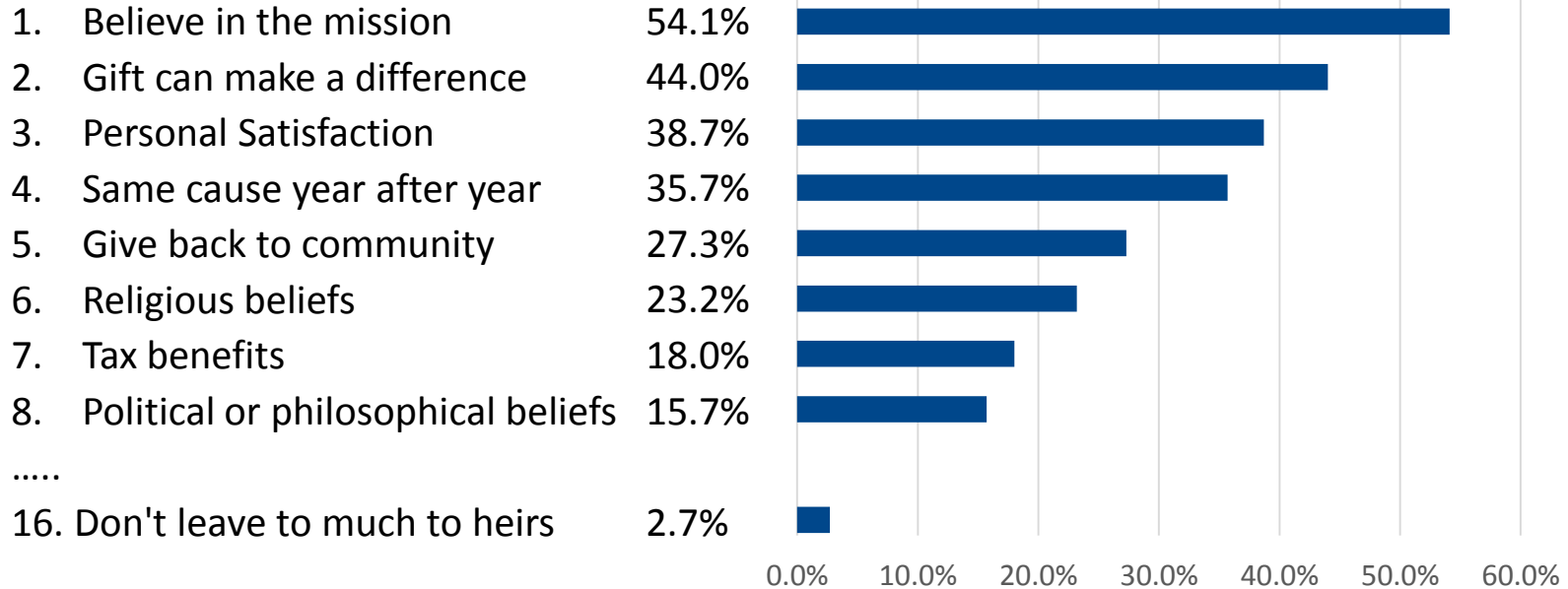
## What Motivates a Donor to Give?

# What Motivates a Donor to Give?



# Why Donors Give/Motivators

## The 2016 U.S. Trust Study of High Net Worth Philanthropy



## Working with HNW donors

### According to Fidelity Charitable:

- **80%** have appreciated assets but only 21% **have given them** to charity
- **41% do not know** these gifts are possible
- **90%** have retirement plans/insurance but **only 9%** named a charity as beneficiary

Our goal is to help donors **recognize opportunities** for blended gifts

## Blended Gifts



A blended gift is one that had both current and deferred components

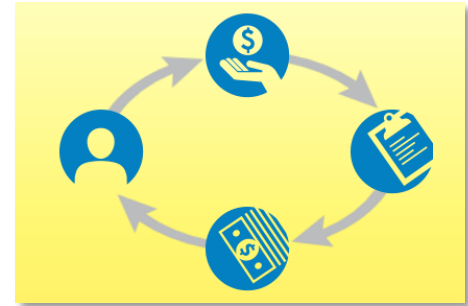
# Appropriate Gift Types



**OUTRIGHT GIFT**

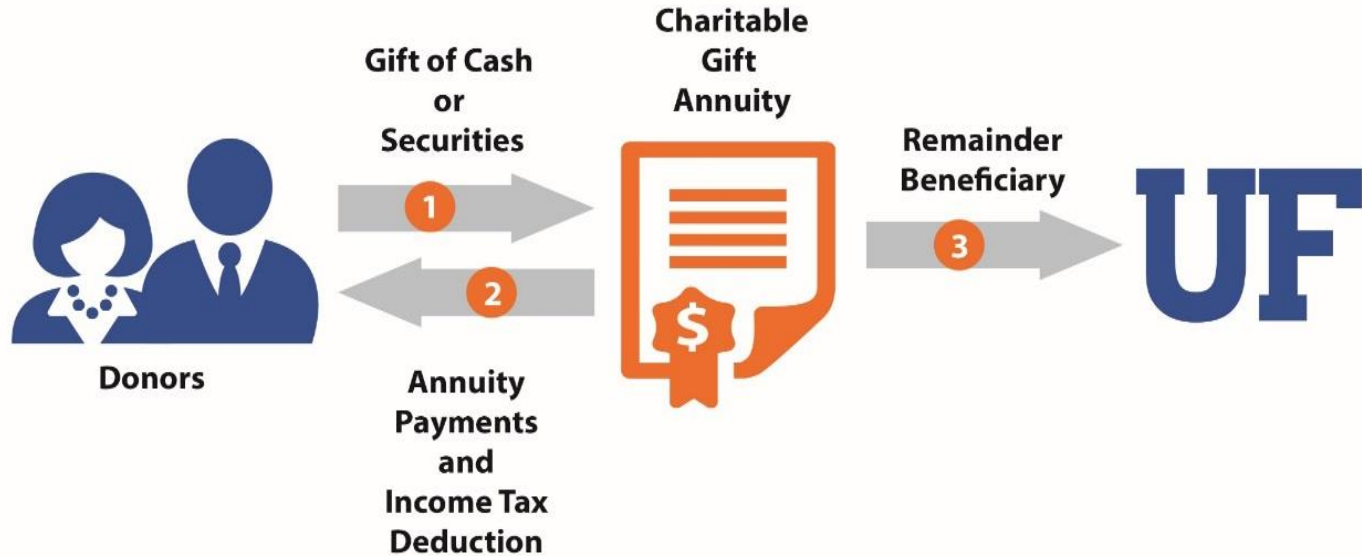


**BEQUEST**



**LIFE INCOME GIFTS**

# Basics of Life Income Gifts



# Tools to Fund a Blended Gift

## 01- Outright Gifts

- Cash
- Appreciated stock
- Qualified Charitable Distributions from an IRA (QCDs)
- Real Estate
- Business Interest
- Gifts-in-kind

## 02- Bequests

- Bequests in a will or trust

## 03- Estate Gifts

- Retirement Plan Assets
- Real Estate
- Life Insurance
- Business Interest
- Collectibles
- Gifts of Remainder Interest

## 04- Life Income Gifts

- Charitable Gift Annuity
- Charitable Remainder Trust
- Charitable Lead Trust
- Etc.

## How to Have the Discussion

- Learn about the donor's interests
- Ask open ended questions about philanthropy
  - Tell me about a recent meaningful charitable gift
  - How do they make their gifts now?
- Determine what inspires the donor – what are their goals
- Tell me the story of your business

## Donor Example #1 – Dr. Doe

- Dr. John Doe
- Age: 79
- House staff medicine 1967
- Grateful patient
- Wanted to make a meaningful gift during his lifetime

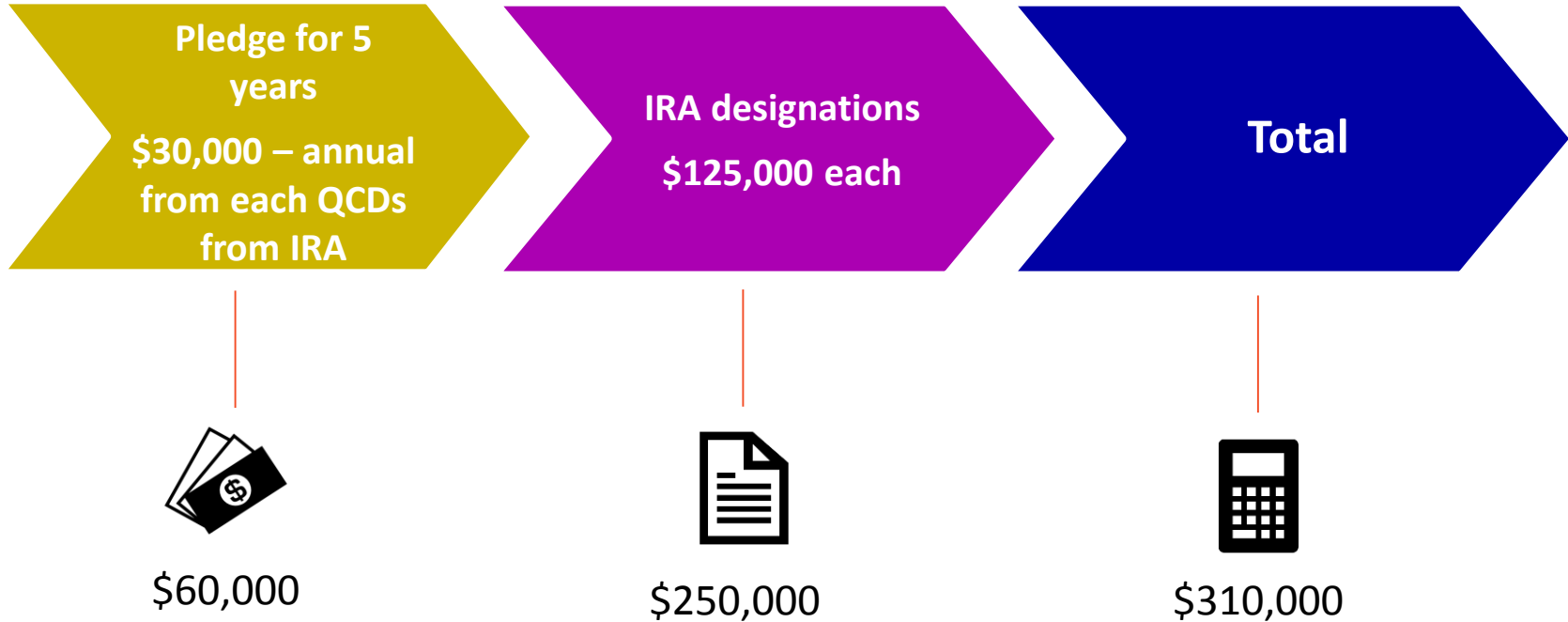
# Dr. Doe's Blended Gift



## Donor Example #2 – Smith/Davis

- Blended couple
- Bob Smith Age: 71 & Jane Davis Age: 77
- Bob was unaware of QCDs - starting making IRA gifts to UF at 70 ½
- Recently married
- Jane liked the idea of QCDs that Bob does
- Jane also wanted to leave a bequest to UF Health
- During discussions with Jane, Bob decided to name us beneficiary of his IRA

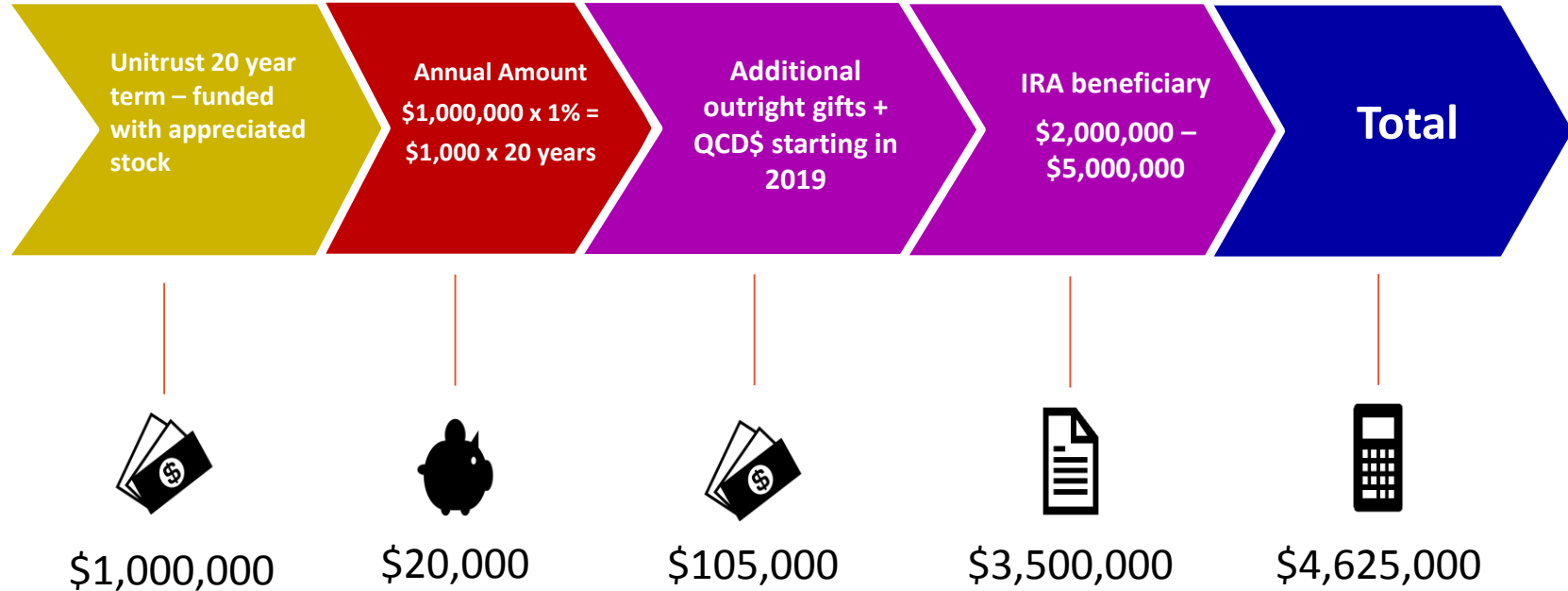
# Smith/Davis Blended Gift



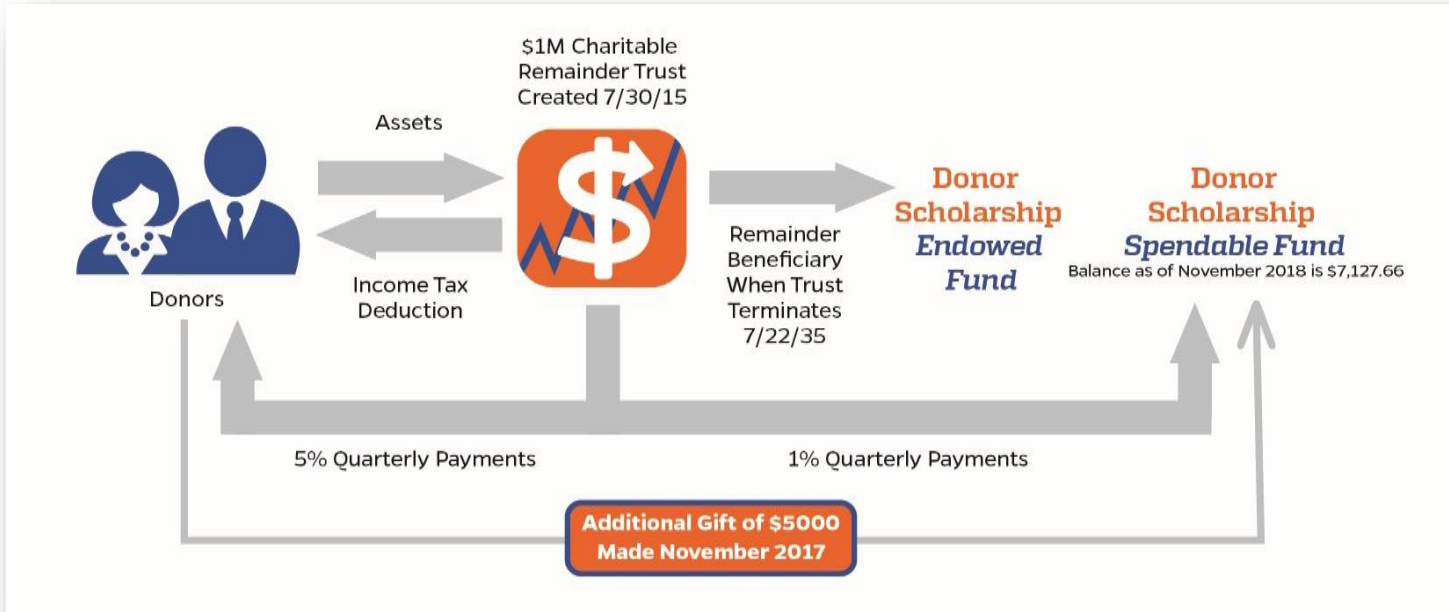
## Donor Example #3 – Drs. Gator

- Ultimate blended gift
- Dr. Alberta Gator– age 69 now
- 1975 COM grads
- Dr. Albert Gator – age 69 now
- Also 1975 COM grad
- Had appreciated securities – wanted to make a gift to fund a scholarship – close to retirement age but wanted income & want to meet student now – see their philanthropy in action

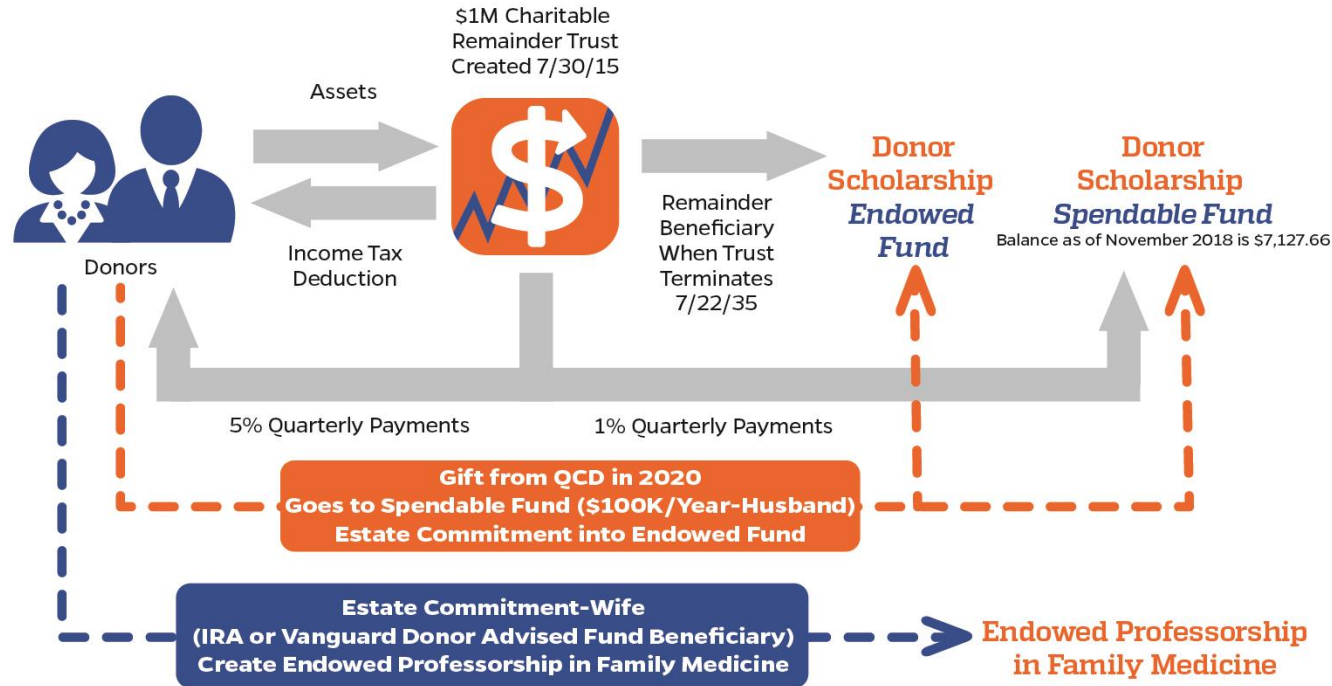
# Way to Blend – Gators Gift



# Gators Current Philanthropy Plan



# Gators Future Philanthropy Plan





THANK YOU!

