

**20/20 Vision – The Future of Planned Giving
10th Anniversary Planned Giving Symposium**



Making the Case for Gift Planning Investment

R. Todd Simpson, CFRE

February 13, 2020

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**R. Todd Simpson, CFRE
Vice President for University Advancement and
Executive Director of the MWSU Foundation**

Todd Simpson has worked in non-profit management and fundraising for more than 30 years.

In 2019 Simpson joined Missouri Western State University as Vice President for University Advancement and Executive Director of the MWSU Foundation.

Prior to joining Missouri Western, Simpson served as the Chief Executive Officer of the Peru State College Foundation (2010 to 2019) where he ushered in a new era of foundation support and alumni engagement. Annual giving doubled under Simpson's leadership and identified estate gifts topped \$20 million. In addition, Simpson guided the Foundation through three capital campaigns to help fund the Oak Bowl Football Stadium renovation, the new campus entrance project and the renovation of the college's performing arts center.

Simpson holds the Certified Fund Raising Executive credential (CFRE), a certificate of completion from the National Planned Giving Institute, a certificate in fundraising management from the University of Nebraska - Omaha, a certificate in grant writing from The Grantsmanship Center, and a certificate in non-profit leadership and management from the University of Wisconsin. He is a member and past president of both the Association of Fundraising Professionals - Nebraska Chapter and the Charitable Gift Planners of Nebraska.




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The Challenge ... Convincing the Board to invest in gift planning.


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The Issue ... Often Boards do not consider gift planning activities valuable.

Boards want:


- Immediate return
- Revenue they can use right now
- To see immediate results

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Gift planning is seen as a luxury that can be cut whenever budgets are tight!




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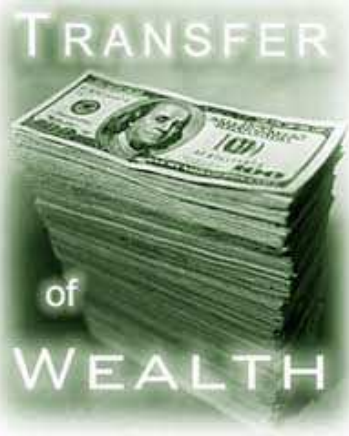


So ... how to establish the importance of sustained investment in gift planning?

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Educate the Board on Transfer of Wealth



- 1999 Millionaires and the Millennium ... \$41 trillion by 2052
- Transfer of wealth still valid – 2003
- Transfer of wealth may drop 15% to 31% – 2013
- Worst case ... down 31% to \$28 trillion.
- U.S. households will transfer \$68 trillion in the next 25 years.
- How much is a trillion?
- 2019 Federal Budget \$.4 trillion!

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