

Effectively Promoting Planned Giving

Mike Goorhouse

Planned Giving

Delayed Gratification Stinks

Have A Plan and A Policy

Keep It Simple

Don't Worry About Professional Advisors

Set A Low Goal

Today. Tomorrow. Forever.

A Campaign for our Community's Endowment

Campaign Goal: To significantly increase the amount of philanthropic resources in the Holland/Zeeland area that is dedicated to meeting local challenges and opportunities today, tomorrow, and forever. We seek to provide near-term growth for our Community's Endowment through \$5 million in "Today" gifts while securing future growth through a pipeline of 100 "Tomorrow" gifts that will benefit our community forever.

Generous lead donors have committed \$3 million in matching funds for both "Today" and "Tomorrow" gifts that the broader community contributes between now and 2018.

- **"Today" Match** - The first \$2 million in gifts to our Community's Endowment will be matched by \$1 million in lead donor gifts. For every \$2 received "Today," \$1 will be added to the Community's Endowment from the matching funds.
- **"Tomorrow" Match** - The first 100 individuals/couples who commit to including the Community's Endowment as a beneficiary of their estate plans will be matched by a total of \$2 million in lead donor gifts "Today." For each new "Tomorrow" commitment, \$20,000 will be added to our Community's Endowment from the matching funds.

How will the "Tomorrow" match work?

In order to qualify for the \$20,000 "Tomorrow" match, an estate commitment must be a minimum of \$50,000 or 5% of the value of the estate. The match amount doesn't change based upon the size of the estate commitment—it is always \$20,000 provided that the minimum threshold is met.

Examples:

- If your estate is worth \$200,000, then a commitment of \$50,000 or 5% (\$10,000) would qualify for a \$20,000 match
- If your estate is worth \$2 million, then a commitment of \$50,000 or 5% (\$100,000) would qualify for a \$20,000 match.

What qualifies as *new*?

- If you already have provided for the Community's Endowment in your estate plan, but haven't notified us, please tell us. This counts as a new commitment and qualifies for the match.
- If you've already notified us that CFHZ is a beneficiary of your estate plan, but haven't specified that your gift is designated for our Community's Endowment, then you can still help secure a match by committing part (or all) of your estate gift to the Community's Endowment.



2015: Pre-campaign
Assets - \$15 million
Annual Grantmaking: \$600,000

2018: After \$5 million in "Today" gifts from campaign
Assets - \$20 million
Annual Grantmaking: \$800,000

2050: After \$20 million in "Tomorrow" estate gifts from campaign
Assets - \$40 million
Annual Grantmaking: \$1.6 million

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Name(s): _____ Phone: _____

Address: _____ Email: _____

"Today" Gift Commitment

- I/we commit to give \$ _____ (total) to our Community's Endowment before the end of 2018, which I/we understand will be matched one dollar for every two dollars we give.

I/we anticipate making gifts according to the following schedule:

\$ _____ 2015 \$ _____ 2016 \$ _____ 2017 \$ _____ 2018

- I/we are willing to have our names listed publicly as contributors to this campaign.

"Tomorrow" Gift Commitment

- I/we have included or commit to including a provision in our estate plan (trust, will, life insurance, retirement plan, etc.) to provide a gift to our Community's Endowment held at CFHZ.
- My/our provision is for a minimum of \$50,000 or 5% of the value of my/our estate, thus meeting the minimum requirement to leverage a \$20,000 campaign match.
- I/we are willing to have our names listed publicly as members of CFHZ's Bridge Builder Legacy Society.

Signature(s): _____ Date: _____

Name(s) as I/we would like to be recognized: _____

- We are interested in meeting with a representative from the Community Foundation to discuss how we may participate in the campaign.

Please return forms to Mike Goorhouse by email (mgoorhouse@cfhz.org), fax (616-396-3573) or mail (85 East 8th St. Suite 110 Holland, MI 49423). You may also contact Mike with any questions you have about the Community Foundation, our Community's Endowment campaign, or your "Today" or "Tomorrow" gift commitment.

Thank you for your commitment to the future of our community!

Questions & Answers

