Planned Giving Who Needs to Know

Planned Giving Marketing

What is planned giving marketing?

Snapshots of 4 Programs

University of Texas at Arlington

University of Texas at Austin

University of Texas at El Paso

University of Texas MD Anderson Cancer Center

- How many marketing tools do you use?
- What two things work best you?
- Name two things that have not worked?

Constituents

Prospective Donors (Limited)

Prospective Donors (Broad)

- Direct Beneficiaries (i.e. alums)
- Organizational Leaders (i.e. Deans/Chairs)
- Long-Term Employees (i.e. Faculty/Staff)
- Previous Inquirers (i.e. reply cards, web inquiries, other)
- Existing Planned Gift Donors
- Targeted Database Lists

Professional Advisors

- Attorneys
- CPAs
- Financial Planners
- Trust Officers
- Others

Internal Major Gift Officers and Others

Existing Planned Gift Donors

- (Purpose: Stewardship and Potential Additional Gifts)

Special

Marketing Efforts

Email

- Segmented- Advisors and Others
- Ongoing branding

Traditional Mailings

- Experimentation with formats
- Limited recipients due to expense

Social Media

- Facebook (Institutional Posting)
- Twitter (Institutional Posting)
- LinkedIn (Personal Posting)

One-on-One Meetings

Comprehensive Website

Relevant content for various constituents such as:

- 1. Anonymous "seekers"
- 2. "Inquirers" (leads)
- 3. Professional advisors

Special eBlasts

- Surveys – Potential gift discoveries
- Special announcements

Specific Mediums for Stewardship

- Survey for Legacy Society members
- Special event planning to build loyalty and community

Estate/Charitable Planning Seminars

- Civic groups in primary geographic clusters
- Professional groups for CE credit

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UNIVERSITY OF TEXAS ARLINGTON

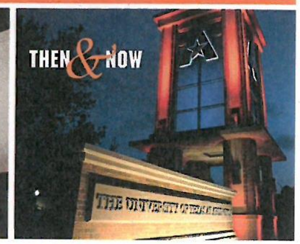
Postcards/Newsletters

UNIVERSITY OF
TEXAS
ARLINGTON

YEAR-END GIFTS

Front Panel

WANT TO BENEFIT FROM A CHARITABLE GIFT THIS YEAR?



HOW CAN WE HELP YOU?

- ❑ I would like information about charitable gift annuities.
- ❑ I am interested in information on charitable income and estate plans.
- ❑ I would like to learn about charitable bequests.
- ❑ I have already included UT Arlington in my estate plan.

Name ______________________________

Street ______________________________

City ________________________________

State/Zip ___________________________

Phone ______________________________

Email ______________________________

(All inquiries are treated with complete confidentiality.)

UNIVERSITY OF
TEXAS
ARLINGTON
OFFICE OF DEVELOPMENT
Box 19198
701 S. Nedderman Dr., Room 421
Arlington, Texas 76019

Cut on fold

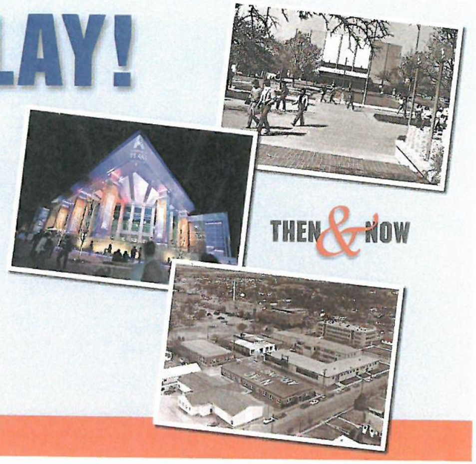
Back Panel

UNIVERSITY OF
TEXAS
ARLINGTON

DON'T DELAY!

The end of the year is coming fast. You still have time to make a gift and receive valuable tax benefits. Depending upon your goals, a charitable gift made this year can provide you with lifetime income, save taxes on the sale of your property, and potentially reduce your taxable income on this year's return.

To learn more about the benefits of making a charitable gift this year, please call us today!



Inside Panel-Left

UNIVERSITY OF TEXAS ARLINGTON

University of Texas at Arlington
701 S. Nedderman Drive, Room 421, Arlington, Texas 76019

Jeffrey Steed
Senior Director of Gift Planning
817-272-9682
steed@uta.edu
www.uta.edu/giving

NO POSTAGE NECESSARY IF MAILED IN THE UNITED STATES

BUSINESS REPLY MAIL
FIRST-CLASS MAIL PERMIT NO. 709 ARLINGTON, TX

POSTAGE WILL BE PAID BY ADDRESSEE

THE UNIVERSITY OF TEXAS AT ARLINGTON
OFFICE OF DEVELOPMENT
BOX 19198
800 S COOPER ST.
ARLINGTON TX 76010-9967

19-0600-0550
Attn: Gift Planning

1. Tear off this half of the postcard and complete the form on the back.
2. Fold and seal with tape before mailing.

Fold here

Tape here

If you have further questions about how gift annuity arrangements can benefit you, please contact us.
We can help you create a plan that achieves your personal and financial goals. Use this reply card to contact us for additional information or visit our website today.

Copyright © 2013 Crescendo Interactive, Inc.

Fold here

Tape here

Inside Panel-Right

UNIVERSITY OF TEXAS ARLINGTON

Steed, Jeffrey

From:	The University of Texas at Arlington <planned_giving@uta.giftlegacy.com> on behalf of The University of Texas at Arlington <steed@uta.edu>
Sent:	Sunday, December 15, 2013 6:17 AM
To:	Steed, Jeffrey
Subject:	UT Arlington Gift Planning eNewsletter - December 2013

Professional Advisors version (1of2)

UNIVERSITY OF TEXAS ARLINGTON | GIVING | INVEST IN BRIGHT FUTURES

GIFT PLANNING TIP

A Legacy for Future Generations

Dr. Jeffrey W. Steed, MBA
Senior Director of Gift Planning

Many consider the legacy they will leave behind for future generations. Some individuals establish a legacy through a scholarship endowment at their alma mater to impact the lives of future students forever. These types of endowments often are funded with planned gifts through a will, trust agreement, life insurance beneficiary form, or retirement account beneficiary form. Some donors establish a Charitable Gift Annuity to receive retirement income with the remainder funds used to create an endowment after their passing. There are many ways to leave a legacy! For more information, please contact me by phone at 817-272-9682 or by email at steed@uta.edu. Thank you.

Maverick Speakers Series Schedule: *http://www.uta.edu/maverickspeakers/*

WASHINGTON NEWS

Bipartisan Support for Budget Deal

Senate Budget Chair Patty Murray (D-WA) and House Budget Chair Paul Ryan (R-WI) have spent the last several weeks negotiating over the federal budget. Read More

PRIVATE LETTER RULINGS

IRS Modifies Foundation's Classification

ORG was formed as a private foundation under 509(a) of the Code. ORG's purpose is to organize, direct and sponsor youth football, cheerleading and pom-pom programs for youths between the ages of 5 and 14 years old. ORG generates income from... Read More

CASE OF THE WEEK

Wild Bill Russell's "Artistic" Unitrust

Bill Russell grew up on the Great Plains. During his youth, he was a rodeo bull rider and gained fame as "Wild Bill" for his daring exploits. But Wild Bill was an artist at heart and soon decided to move on to his artistic...

UNIVERSITY OF TEXAS ARLINGTON

Steed, Jeffrey

From:	The University of Texas at Arlington <planned_giving@uta.giftlegacy.com> on behalf of The University of Texas at Arlington <steed@uta.edu>
Sent:	Saturday, December 14, 2013 11:11 AM
To:	development@uta.edu
Subject:	UT Arlington Gift Planning eNewsletter - December 2013

other constituents version (1 of 2)

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Free Will Planning Toolkit for Leaving a Legacy: https://uta.giftlegacy.com/?pageID=99

PERSONAL PLANNER

How to Fund Your Living Trust

A revocable living trust is one of the principal estate planning methods. While everyone should have a will, there are many benefits of a revocable living trust. Read More

SAVVY LIVING

How to Guard Against Wintertime Heart Attacks

When I had a mild heart attack about six months ago my doctor told me I needed to be extra careful during the winter when recurring heart attacks are more common. Is this true? How can the seasons affect your heart? Read More

YOUR PLAN

Never Forgetting His Passion for Education Parents Fulfill Late Son's Wish

Dan and Gloria McQueen seem to know The University of Texas at... Read More

UNIVERSITY OF TEXAS ARLINGTON

UTEP e-mail Bequest

The University of Texas at El Paso

UTEP

Dear NAME,

As we approach our 100th anniversary in 2014, we want to make sure the University can continue providing access and excellent educational opportunities to the Paso de Norte region for another 100 years. You can make this possible by including a gift to the University in your estate plans.

It is through your continued support that UTEP is able to provide students with the resources necessary to succeed. As we near our Centennial Celebration, I ask that you reflect upon your time spent at the University and the importance of higher education. Your generosity will greatly impact the lives of future generations of students and will leave a lasting legacy for years to come.

Please contact us with the survey form below, or click here to let us know you have named UTEP in your will. We can ensure that your good intentions are allocated to the areas most important to you.

Thank you for your commitment to UTEP's students - GO MINERS!

Sylvia Y. Acosta

Sylvia Y. Acosta, Ph.D.
Associate Vice President of University Development and Alumni Relations

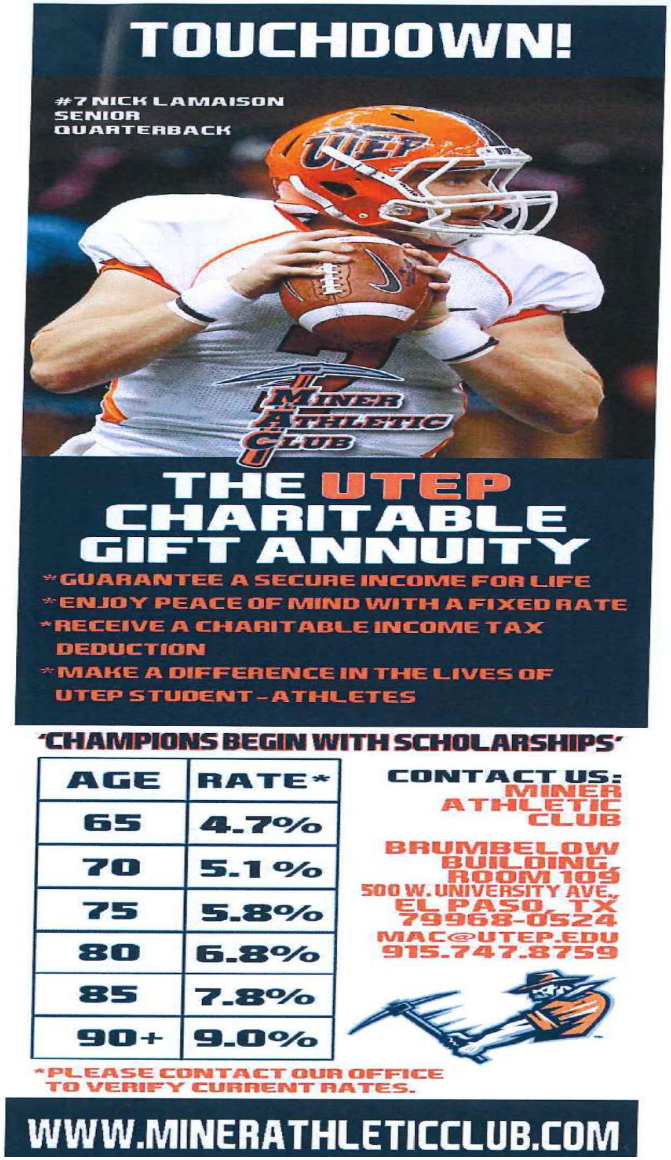
Please contact us by selecting an option:

- [ ] I have included a gift to UTEP in my will or other estate plans.
- [ ] I would consider including a gift to UTEP in my will or other estate plans.
- [ ] I would like more information on how to support UTEP through my estate.

UTEP 100 YEARS
CENTENNIAL CELEBRATION · 1914-2014
THE UNIVERSITY OF TEXAS AT EL PASO

Your gift counts toward UTEP's Centennial fundraising campaign - Support UTEP Today!

UTEP Gift Annuity Advertisement



Website

Call Center

Social Media

Faculty Estate Planning

Women's Seminar

UTEP Estate Planning Conference

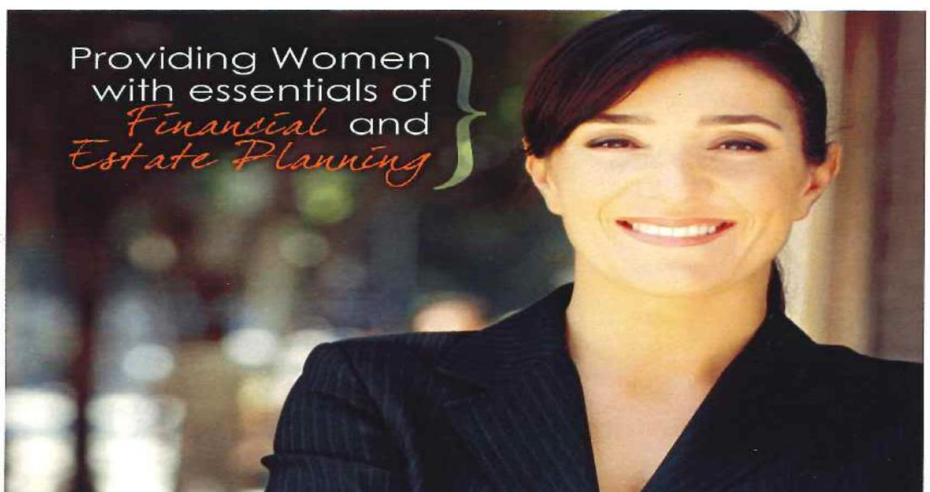
The UTEP Woman's Auxiliary and The University of Texas at El Paso, invite you to participate in a five-week series conference designed to provide women with the fundamentals of financial and estate planning.

Led by business professionals, conference topics include:

Legal Aspects of Estate Planning	Transfer Taxes in Estate Planning	Income Taxes in Estate Planning	Life Insurance
Asset Protection	Elder Law	Charitable Giving	Administration of Estates and Trusts

Begins January 27, 2011
Held each Thursday for five weeks on the UTEP campus
Limited spaces, reservations required
Free of charge

To reserve your spot today, call Lucy Garcia at (915) 747-8529 or Jeannie Johnston at (915) 584-9388.



46th annual
ESTATE PLANNING CONFERENCE
for women

UTEP

Coming January 2012

Brought to you by UTEP Woman's Auxiliary and The University of Texas at El Paso

Where else are you being seen?

- Other tools that have been used to market planned giving
- What is the like on your campus?

Questions

If you have any other questions, you may contact any of the panelists.

- Laura Dean
- Lucy Garcia
- Shelley Robson
- Jeff Steed