

Getting to First Base: Insights Into Marketing Your Gift Planning Program

University of Texas System Seminar
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What is Gift Planning?

Gift planning involves helping philanthropic individuals make larger gifts than they could make from their income alone. A planned gift is a significant gift, made in lifetime or at death, as part of a donor's overall financial and estate planning. Gift planning uses estate and tax planning techniques to help donors provide for charity and their loved ones/heirs in ways that maximize the gift and the donor's potential tax savings and minimize the impact on the donor's estate.



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Why Gift Planning?

Gift planning expands the giving opportunities that are available to those who believe in the mission of your organization.

- Did you know that only 5% of the wealth in this country is held in cash? The other 95% is held in non-cash assets.



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Gift Planning Questions

- **When To Give?** Either now, later, or both. “Later” is often at death.
- **How To Give?** For example, outright gifts, gifts that provide a life income or benefit to person(s), gifts that give income to the charity, bequest, or beneficiary designation.
- **What To Give?** For example, cash, stock, closely held business interests, real estate, art, life insurance, retirement plan.



What Can UT System Accept?

- Cash
- Securities
- Bank Account
- Investment Accounts
- Retirement Plan
- Life Insurance
- Real Estate
- Oil, Gas, Mineral Interests
- Closely held business interests
- Intellectual Property
- Artwork & Collectibles
- Personal Effects



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Focusing Our Efforts for Maximum Success

- Bequests and trusts
- Retirement plans, life insurance, bank and brokerage accounts
 - All of these only require a beneficiary designation
 - IRA Rollover gifts
- Life income plans
 - Charitable gift annuity and Charitable remainder trust
- Special opportunities
 - upcoming changes to tax laws or gift annuity rates



Marketing Your Gift Planning Program

Personal visits

- Your best prospects are loyal donors

“We have found that people like you who love UT and have been such loyal donors over the years have often included us in their estate plans. Is that something you’ve done or would be willing to discuss?”

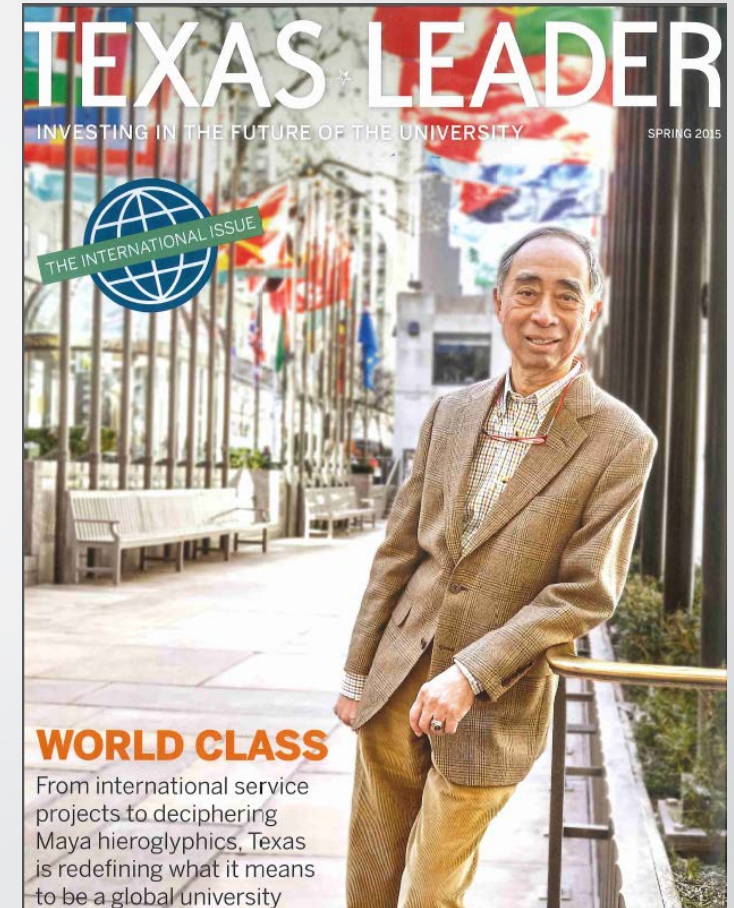


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Marketing Your Gift Planning Program

- Website
 - Include bequest language and ways to make planned gifts
- Newsletters
 - Donor stories showing impact of planned gifts
 - Links to gift planning site
- Printed materials
 - Brochures, one pagers on current topics



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- Search
- ▶ Annual Giving
 - ▶ Corporate Relations
 - ▶ Endowments
 - Foundation Relations
 - Gift & Estate Planning**
 - Matching Gifts
 - ▶ Students Hooked on Texas
 - UT Employee Payroll Deduction
 - Make a Gift

WHY GIVE TO UT? | HOW TO GIVE | OUR DONORS | CAMPAIGN FOR TEXAS | LEARN MORE

Gift & Estate Planning: Land of Opportunity

Mineral Interests


Did The University of Texas at Austin help expand your horizons, leading you to become the person you are today? You have the power to create the same opportunities and enrich the lives of future Longhorns by donating an asset you may not have considered before — land and minerals.

Long-term Support of Education


Gifts of land and mineral interests are long-term investments in the university's continuing progress and constant improvement. You may never have considered this, but you can create an endowment — or many different endowments — to advance programs that are most meaningful to you.

Maybe you want to help students who struggle to attend college. Maybe you want to help create new hands-on experiences and research opportunities for students. Or maybe you want to help revolutionize how disciplines come together to solve the world's toughest problems.

However you choose to direct your donation, your support enhances UT's excellence and helps us remain one of the most powerful centers of learning, research, and creativity. Who knows? Your gift could be the support needed to make the next world-changing discovery possible.



In 1923, Santa Rita No. 1 struck oil on university lands, generating a rich source of funding for Texas education. Photo: Courtesy of Dolph Briscoe Center for American History



Cockrell School of Engineering students benefit from the generosity of alumni and friends.

Contact Us

Phone: 512-475-9632 or 800-687-4602
giftplan@austin.utexas.edu
Complete Contact Information

TEXAS LEADERSHIP SOCIETY JOIN TODAY

Gift Planning Tools

- Planned Giving
 - Estate Intention Letter
 - Personal Estate Planning Kit
 - Wills and Living Trusts
 - Beneficiary Designations
 - Charitable Gift Annuities
 - Charitable Remainder Trusts
 - IRA Charitable Gifts
 - Charitable Lead Trusts
 - Land and Mineral Interests
 - Real Estate
 - Memorials and Tribute Gifts
 - Endowed Gifts
 - Donor Advised Funds
 - Donor Stories
 - Your Gifts at Work

Resources

- Sample Language and Forms
- For Professional Advisors
- Gift Planning Guide
- Doing Well While Doing Good



UT RESEARCHER NICOLA TISATO STUDIES MINERAL DEPOSITS IN ASPERGE CAVE IN FRANCE WITH RESEARCH COLLEAGUES.

HOW MINERALS KEEP ON GIVING

You can make a perpetual gift of mineral interests that will keep giving to UT Austin.

Jack Jackson had the utmost trust in UT Austin and the Jackson School and its trained team of geologists, accountants, engineers, economists, administrators, and other professionals to manage mineral interests from leases covering 175,000 acres used for both existing and future wells from his estate. During the 12 years since his death, the Jackson gift of mineral interests has fluctuated from \$200,000 per month to almost \$900,000 per month, depending on the price of oil and gas products. These mineral interests will continue to generate money indefinitely for the Jackson School and create opportunities for future generations of Longhorns.

If you are interested in making a gift of land or mineral interests, please contact us at 800-687-4602 or visit giving.utexas.edu/land.

TEXAS LEADER • SPRING 2016 • INFORMATION REQUEST FORM

THANK YOU for your interest in supporting The University of Texas at Austin. If you would like additional information, please visit giving.utexas.edu/giftplanning, call 800-687-4602, email giftplan@austin.utexas.edu, or complete this form and return it in the enclosed prepaid envelope.

Name: _____
Mailing Address: _____


Email: _____
Telephone: _____

☐ I have already included UT Austin in my estate plans.
I WOULD LIKE INFORMATION ABOUT:
☐ Establishing a charitable trust
☐ How to include UT Austin in my estate or as a beneficiary
☐ Other _____

☐ Please remove me from your mailing list.

PHOTO: TOMASO BONTONGALI

WHAT STARTS HERE CHANGES THE WORLD



LAND OF OPPORTUNITY

DID THE UNIVERSITY OF TEXAS AT AUSTIN HELP EXPAND YOUR HORIZONS, LEADING YOU TO BECOME THE PERSON YOU ARE TODAY? YOU HAVE THE POWER TO CREATE THE SAME OPPORTUNITIES AND ENRICH THE LIVES OF FUTURE LONGHORNS BY DONATING AN ASSET YOU MAY NOT HAVE CONSIDERED BEFORE — LAND AND MINERALS.

Long-Term Support of Education

Gifts of land and mineral interests are long-term investments in the university's continuing progress and constant improvement. You may never have considered this, but you can create an endowment — or many different endowments — to advance programs that are most meaningful to you.


Maybe you want to help students who struggle to attend college. Maybe you want to help create new hands-on experiences and research opportunities for students. Or maybe you want to help revolutionize how disciplines come together to solve the world's toughest problems.

However you choose to direct your donation, your support enhances the university's excellence and helps us remain one of the most powerful centers of learning, research, and creativity. Who knows? Your gift could be the support needed to make the next world-changing discovery possible.

Stewarding Your Legacy

Like you, the state of Texas recognizes the importance of education and the need to invest in its long-term growth and advancement. University Lands, an organization of the UT System, has been stewarding the largest land and minerals endowment in the country for over 100 years. The employees of University Lands hold the Lone Star State's natural assets near and dear. Today this team of experts oversees holdings not just in Texas but also in 21 additional states and Canada that were entrusted to University Lands by generous donors like you.

From oil and gas royalties to lease payments and grazing fees, the University Lands office is among the nation's most reliable and experienced managers of natural resources. You can feel secure knowing that professionals with several hundred years of combined oil and gas expertise will manage your land or mineral interests responsibly while maximizing their impact for The University of Texas at Austin.



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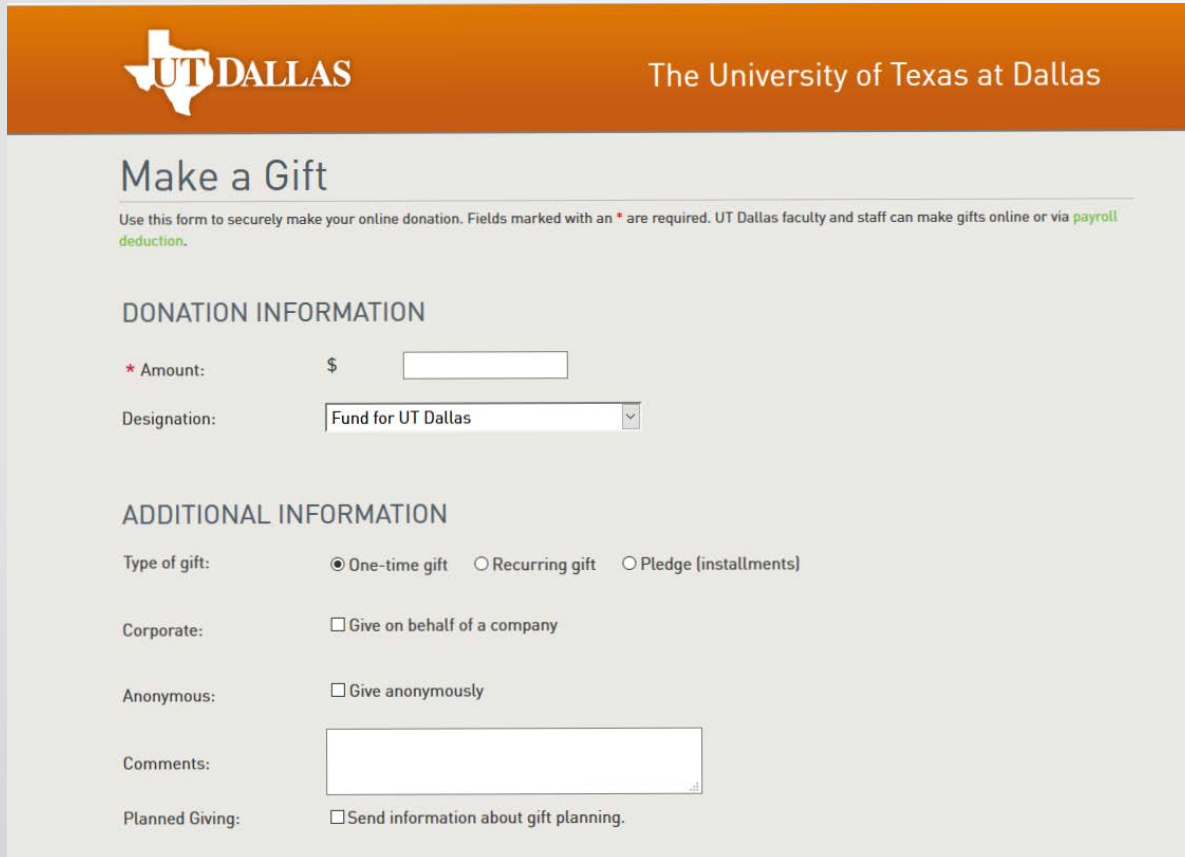
Use your leadership to set an example



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Use Your Annual Giving Program to Discover Planned Gift Prospects



The screenshot shows the 'Make a Gift' page for The University of Texas at Dallas. The header is orange with the UT Dallas logo and name. Below the header, the page title 'Make a Gift' is followed by a note: 'Use this form to securely make your online donation. Fields marked with an * are required. UT Dallas faculty and staff can make gifts online or via payroll deduction.' The form is divided into two sections: 'DONATION INFORMATION' and 'ADDITIONAL INFORMATION'. In the 'DONATION INFORMATION' section, there is a field for the amount (marked with an asterisk) and a dropdown menu for the designation, which is currently set to 'Fund for UT Dallas'. The 'ADDITIONAL INFORMATION' section includes radio buttons for the type of gift (One-time gift, Recurring gift, Pledge (installments)), checkboxes for corporate and anonymous gifts, a comments text area, and a checkbox for 'Send information about gift planning.' under the 'Planned Giving' heading.

UT DALLAS The University of Texas at Dallas

Make a Gift

Use this form to securely make your online donation. Fields marked with an * are required. UT Dallas faculty and staff can make gifts online or via payroll deduction.

DONATION INFORMATION

* Amount: \$

Designation:

ADDITIONAL INFORMATION

Type of gift: ☒ One-time gift ☐ Recurring gift ☐ Pledge (installments)

Corporate: ☐ Give on behalf of a company

Anonymous: ☐ Give anonymously

Comments:

Planned Giving: ☐ Send information about gift planning.

- Loyal annual donors are your best planned giving prospects
- Add gift planning to your online giving form.
- Add a question or two about planned gifts to your annual giving call script.



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Use Your Annual Giving Program to Discover Planned Gift Prospects

Add planned giving request in gift acknowledgement letters.



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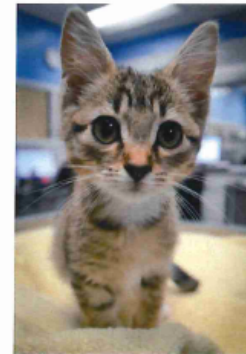


February 5, 2014

Marcia D Inger
2400 Inner Campus Dr.
Main Building, 4th Floor
Austin, TX 78712

Dear Marcia Inger,

Thank you for your gift of \$120 to the City of Austin Combined Charities Campaign. We have recently received notification of your gift. Your generosity is making an impact on some of the most vulnerable animals in Central Texas. Thanks to your support, we are able to save the lives of animals that need our help today and provide programs that prevent future homeless. Your support touches the lives of over 11,000 animals like Fiona each year.



Meet Fiona. Early one chilly fall morning, we found shivering little Fiona in a box outside our building – she had been abandoned sometime during the night and was in desperate need of care. She was suffering from an extremely painful abdominal hernia, most likely caused by some sort of trauma, and she clearly ached with each and every breath she took. Fiona needed emergency abdominal surgery to end her pain and save her life.

Thanks to donors like you, AHS was able to give Fiona everything she needed. Shortly after surgery, Fiona was playing, pouncing and purring just like any kitten would! It was clear that she was happy, healthy and no longer in pain. While she recovered from her surgery, she spent several weeks in our onsite clinic where her progress was closely monitored by our clinic staff. During that time, one of the staff members caring for her fell in love with sweet Fiona, and decided to adopt her! Fiona now lives a very spoiled life with her AHS Alumni sister, Evie the Chihuahua. Thank you for your ongoing support, without you we could not save the lives of animals in need like Fiona!

Thank you again for your gift. And thank you for unleashing hope for Fiona and so many other dogs and cats each and every day.

Sincerely,

Frances Jonon
Executive Director

P.S. Please consider creating a legacy that will save animals' lives by including AHS in your will or trust, and let us know when you do. To find out more, please visit austinhumanesociety.org/give/plannedgiving.

124 W. Anderson Lane Austin, Texas 78752
P (512) 646 PETS F (512) 837 9132
austinhumanesociety.org

A project of The Junior League.



Interested in more ways to help animals in Central Texas?

- Join our Animal Friends Monthly Giving Club and make an impact all year long.
- Follow us on Facebook facebook.com/austinhumanesociety
- Please consider being a volunteer! austinhumanesociety.org/volunteer
- Looking to donate your car to benefit a worthy cause? Please visit austinhumanesociety.org/give/donate-car

Have questions? Contact (512) 685-0150 or development@austinhumanesociety.org

Save lives. Hope.

QUESTIONS?



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512-499-4320



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