

Crescendo
 Integrated Marketing for
Planned Gifts
 ADVANCE - "Current Gifts"
 IRA Charitable Rollover/QCD
 DAF Grants

Sandra Henningsen, AVP Integrated Marketing, Mountain Region
 Ryan LaCanfora, AVP Integrated Marketing, Western Region

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QCD/IRA Charitable Rollover – Potential

- Donors over age 70½ have about \$4 trillion to \$7 trillion in IRA accounts.
- DAF and IRA gifts (QCDs) could be \$80 billion+ this year.

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CEOs That Care And CFOs Who Count

The diagram illustrates a process flow. On the left, two blue silhouettes represent 'CEO Cares' and 'CFO Counts'. A large blue arrow points from these silhouettes to a central light blue oval. Inside this oval, there are two figures: one holding a globe labeled 'IRA Gifts' and another holding puzzle pieces labeled 'DAF Gifts', with a large ampersand (&) between them. Below this oval is the text 'MORE GIFTS'. A dotted line connects the central oval to a light blue circle on the right containing an upward-pointing arrow and the text 'Advance Total'.

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Institute for Creation Research

4% Increase in Number of Donors
34% Increase in Funds
"Increased ICR Mission Awareness"

- GiftLegacy ICR Branded Website – Added Current Giving to Future Giving
- IRA & DAF Current Gifts
- Eblasts
- Social Media Ads

Results not guaranteed and may vary. **"Thank you, Crescendo GiftLegacy!"**

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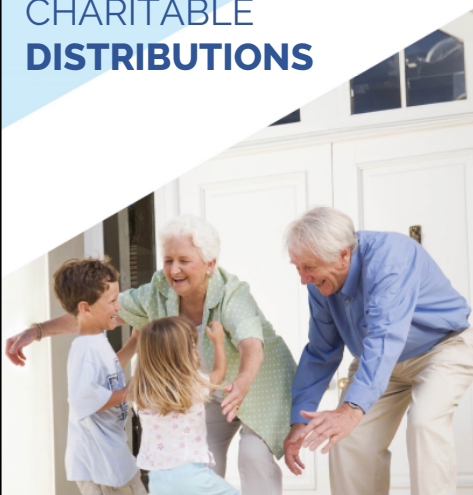
IRA Rollover Gifts (QCD)



- Direct Transfer
- \$105,000 Maximum
- Age 70½
- No Tax Deduction
- Not Taxable as Income
- Not subject to deduction limits on charitable gifts

5

The Secrets of Growing **Qualified** CHARITABLE DISTRIBUTIONS

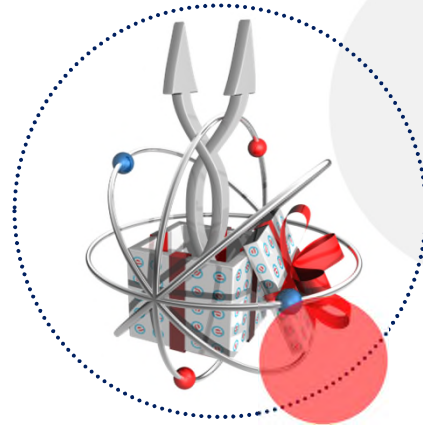
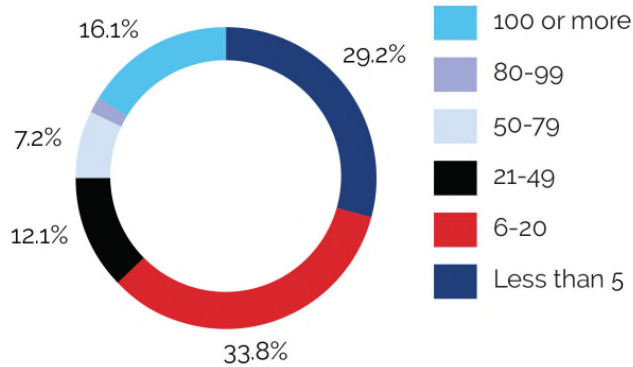


2024 Major & Planned Gifts Marketing Study

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QCDs by the Numbers

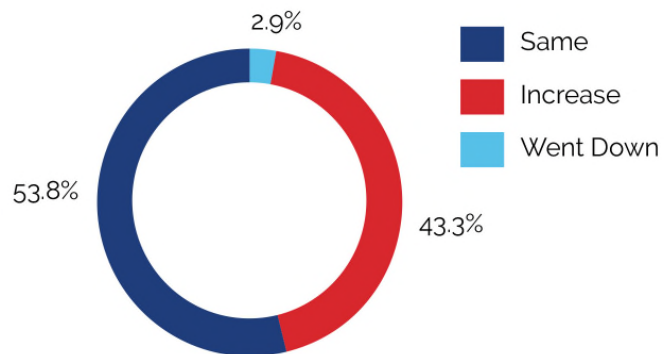
How many QCDs did you receive in the last 12 months?



7

Stability and Growth

How did the number of QCDs received this year compare to the prior year?

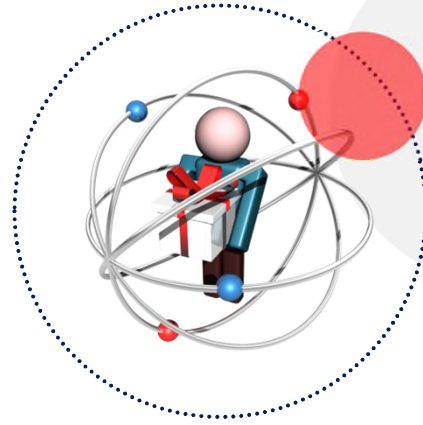
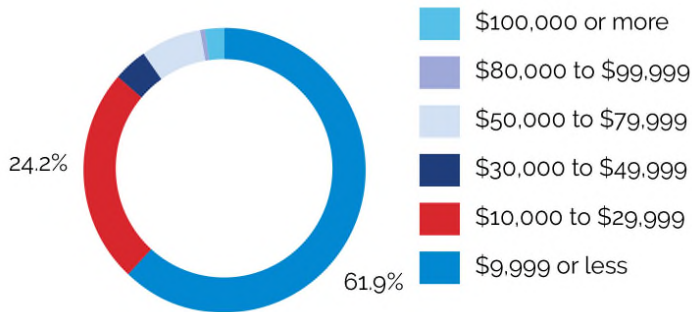


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Small Gifts Matter

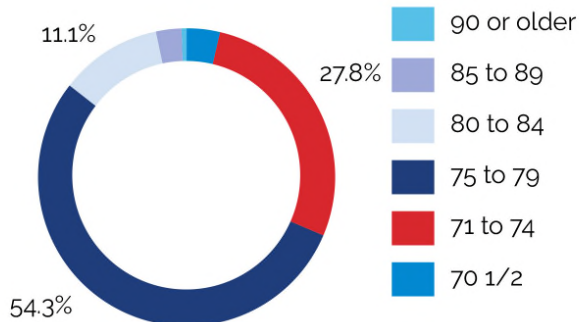
What was the average size of your QCDs?



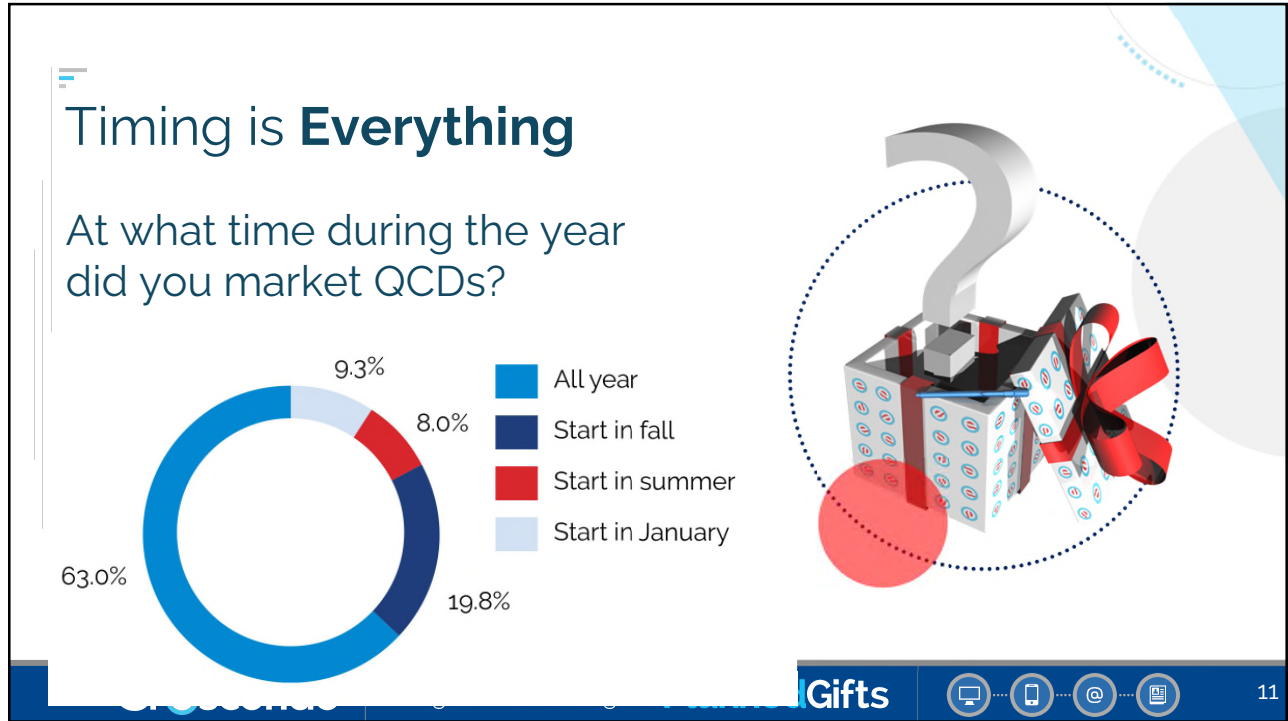
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Older Than Age 70^{1/2}

What was the average age of your QCD donors?



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The Secrets of Growing **Qualified** CHARITABLE DISTRIBUTIONS

2024 Major & Planned Gifts Marketing Study

crescendointeractive.com
800-858-9154

Published by
Crescendo
Integrated Marketing for Planned Gifts

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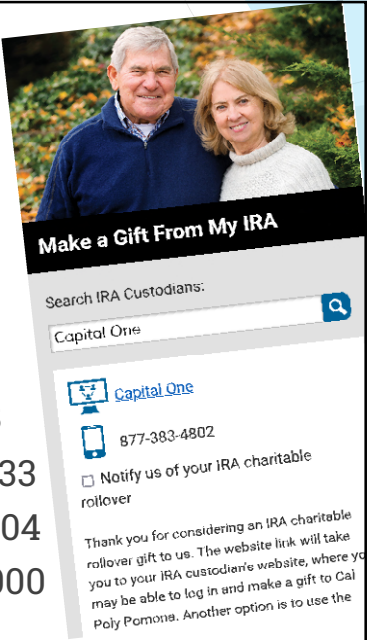
Cal Poly Pomona


43% Repeat Donors!

- 2024** - 56 Rollovers = \$466,373
- 2023** - 45 Rollovers = \$267,791
- 2022** - 46 Rollovers = \$290,153.49
- 2021** - 29 Rollovers = \$158,260.08
- 2020** - 32 Rollovers = \$165,804.33
- 2019** - 30 Rollovers = \$158,804
- 2018** - 4 Rollovers = \$10,000


IRA Marketing Implemented 2019 →

(Fiscal Year: July 1 to June 30) *Results not guaranteed and may vary.*





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Life Outreach International

- 2022 - \$966,637 – 643 Gifts
- 2021 - \$782,177 – 536 Gifts
- 2020 - \$414,530 – 360 Gifts
- 2019 - \$131,007 – 282 Gifts
- 2018 - \$524,766 – 242 Gifts
- 2017- \$120,210 – 77 Gifts
- 2016 - \$34,764 – 24 Gifts
- 2015 - \$126,300 – 8 Gifts



“150% increase in IRA Rollovers from 2020 to 2021”

Vaughn Peak, National Coordinator, Life Planning Services.
Began Receiving Rollovers in 2011.

Results not guaranteed and may vary.



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IRA Rollover eBlast Campaign

September 15

- Enewsletter Header Offers
- Postcard
- Eblast Following Postcard
- Website Content – Donor Story
- Social Media Post



IRA Rollover Campaign Annual Schedule

Q1

- January 15 – Eblast
- New Year. New Opportunities.

Q2

- April 15 - Eblast
- Tax Education Day

Q3

- July 15 – Eblast
- Why wait?

August

- Add IRA Rollover donor story to website
- Add IRA Rollover banner to website

September

- Second week of September – Enewsletter promo
- Third week of September – Postcard hits mailboxes
- Fourth week of September – Eblast to follow-up postcard
- Fourth week of September – Facebook post

October

- Follow-up, phone calls, donor visits

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IRA Rollover Campaign – Giving Widget

LAMAR UNIVERSITY
Giving Home How to Give What to Give Learn About Wills

Division of University Advancement
Gift and Estate Planning
Donor Stories Calculators

E-newsletter Estate Planning Guide Lamar University Legacy Society Planned Giving Advisory Council

Giving Home / How to Give / IRA Rollover Text Size

Print Email Calculator Brochure Contact Us Video

IRA Charitable Rollover

If you are aged 70½ years or older, you may want to consider making a charitable donation through a Qualified Charitable Distribution ("QCD"). A QCD is a direct transfer of funds from your IRA custodian to a qualified charity.

The Lamar University Foundation serves as the preferred channel for private gifts to all areas of Lamar University to support its educational mission.



Benefits of an IRA charitable rollover

- Unlike regular withdrawals from your IRA, a QCD excludes the amount donated from taxable income
- QCDs don't require that you itemize, which means you can take advantage of the higher standard deduction

Make a Gift From My IRA

Search IRA Custodians:

🔍

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The Y
Giving Home How to Give What to Give Learn About Wills Donor Stories Calculators

IRA CHARITABLE ROLLOVER

Giving Home / How to Give / IRA Rollover Text Size

Print Email Calculator Brochure Contact

You may be looking for a way to make a big difference to help further our mission. If you are 70½ or older, you may also be interested in a way to lower the income and taxes from your IRA withdrawals. An IRA charitable rollover is a way you can help continue our work and benefit this year.



Howchart: Donor directs IRA custodian to make an IRA charitable rollover gift to YMCA.

Benefits of an IRA charitable rollover

- Avoid taxes on transfers of up to \$105,000 from your IRA to our organization
- May satisfy your required minimum distribution (RMD) for the year
- Reduce your taxable income, even if you do not itemize deductions
- Make a gift that is not subject to the deduction limits on charitable gifts
- Help further the work and mission of our organization


How an IRA charitable rollover gift works

BOISE RESCUE MISSION
DONATE GET INVOLVED MEDIA SERVICES FACILITIES ABOUT US

LEGACY GIVING

IRA CHARITABLE ROLLOVER

You may be looking for a way to make a big difference to help further our mission. If you are 70½ or older you may also be interested in a way to lower the income and taxes from your IRA withdrawals. An IRA charitable rollover is a way you can help continue our work and benefit this year.




BENEFITS OF AN IRA CHARITABLE ROLLOVER

- Avoid taxes on transfers of up to \$105,000 from your IRA to our organization
- May satisfy your required minimum distribution (RMD) for the year
- Reduce your taxable income, even if you do not itemize deductions
- Make a gift that is not subject to the deduction limits on charitable gifts
- Help further the work and mission of our organization

HOW AN IRA CHARITABLE ROLLOVER GIFT WORKS

1. Contact your IRA plan administrator to make a gift from your IRA to us.
2. Your IRA funds will be directly transferred to our organization to help continue our important work.
3. Please note that IRA charitable rollover gifts do not qualify for a charitable deduction.
4. Please [contact us](#) if you wish for your gift to be used for a specific purpose.

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IRA Rollover Campaign Marketing

By taking a distribution from your IRA this year, you will likely pay more in taxes and may even reach a higher tax bracket. **Rolling over** part of your IRA's "required minimum distribution" or "RMD" to the Lamar University Foundation can help reduce your tax bill while supporting LUI!

If you are **70½ or older**, you can make a gift of up to **\$100,000** this year from your IRA. To get started with your gift, you can focus your smart phone's camera on the QR code below and follow the instructions provided or contact your IRA administrator.

While you will not receive an income tax deduction, you will not pay taxes on any distributions made to us. Please also **inform us** of your plans.

Lamar University
P. O. Box 10011
Beaumont, TX 77710

(800) 880-7895
smroller@lamar.edu
lamar.edu/legacy

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Rollover Your IRA for Good

- Pay no income tax on your gift
- Support Lamar University
- Build your charitable legacy
- Use your IRA in the way you want

70½ OR OLDER
YOU CAN DIRECT UP TO **\$100,000**

Young Harris College

Newsletter

DO YOU HAVE WONDER WHAT THE FUTURE HOLDS?

HOW CAN WE HELP YOU?

SUPPORT THE CAUSES YOU CARE ABOUT

Young Harris College
275 Elm Street
Young Harris, GA 30592
404.885.1111
youngharris.edu

Brochure

Young Harris COLLEGE
EST. 1866

Personal PLANNING Newsletter

Fall 2020

- Why Pay Too Much in Taxes?
- A Way to Replace the Stock of Your IRA
- Take Advantage of the New Spouse's Deduction

NEW TAX LAWS

NEW WAYS TO SAVE

youngharris.edu
P. O. Box 275, Young Harris, GA 30592, (706) 878-9227

Postcards

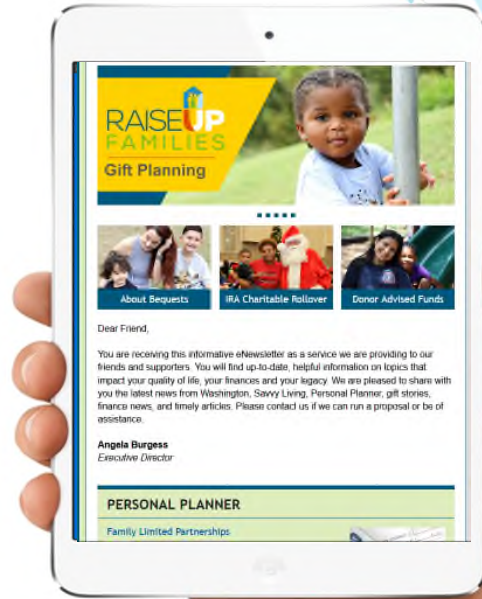
IRA ROLLOVER YOUR SAVINGS, YOUR LEGACY.

70½ OR OLDER
YOU CAN DIRECT UP TO **\$100,000**

A SIMPLE PLAN Provides PEACE

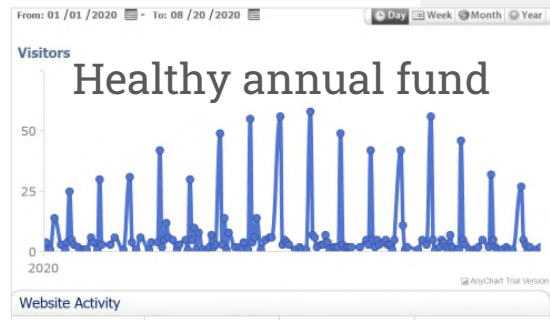
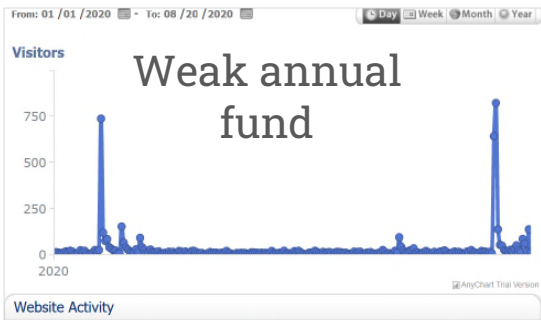
Enewsletters

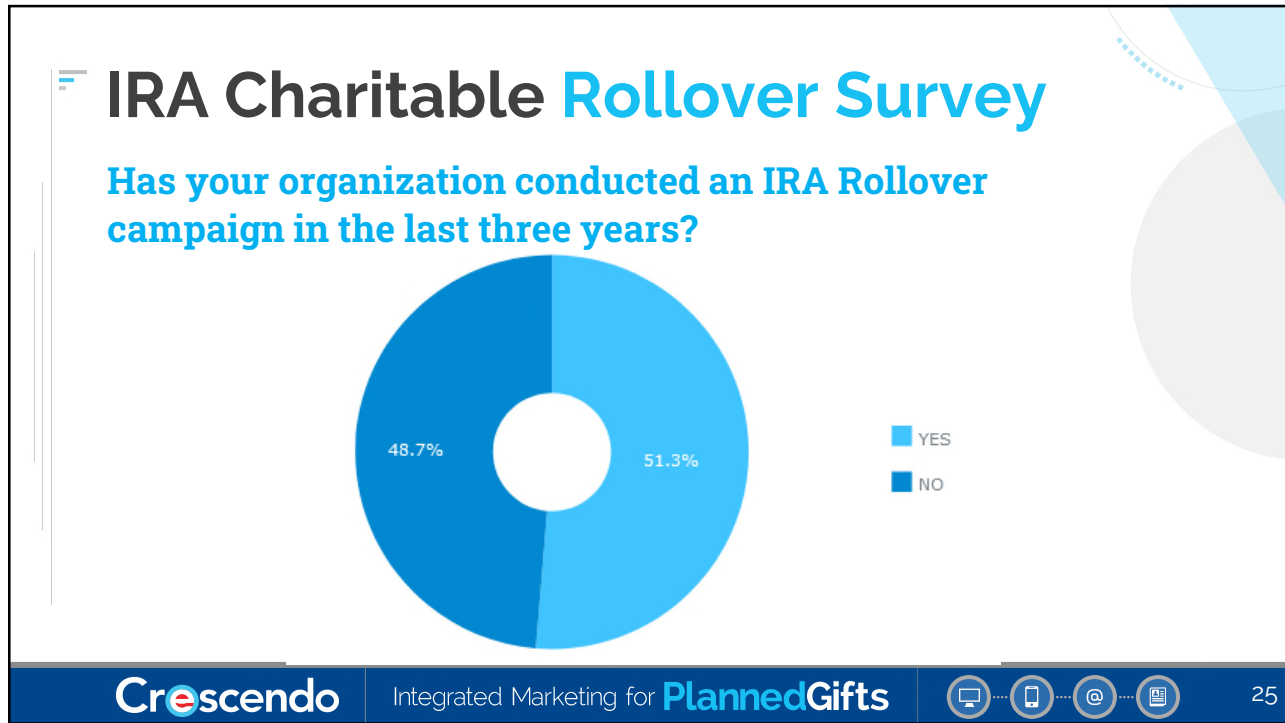
- Generates Top Prospect list
- Drives traffic to website
- Shares good content, a gift
- Reaches out consistently
- Provides stewardship



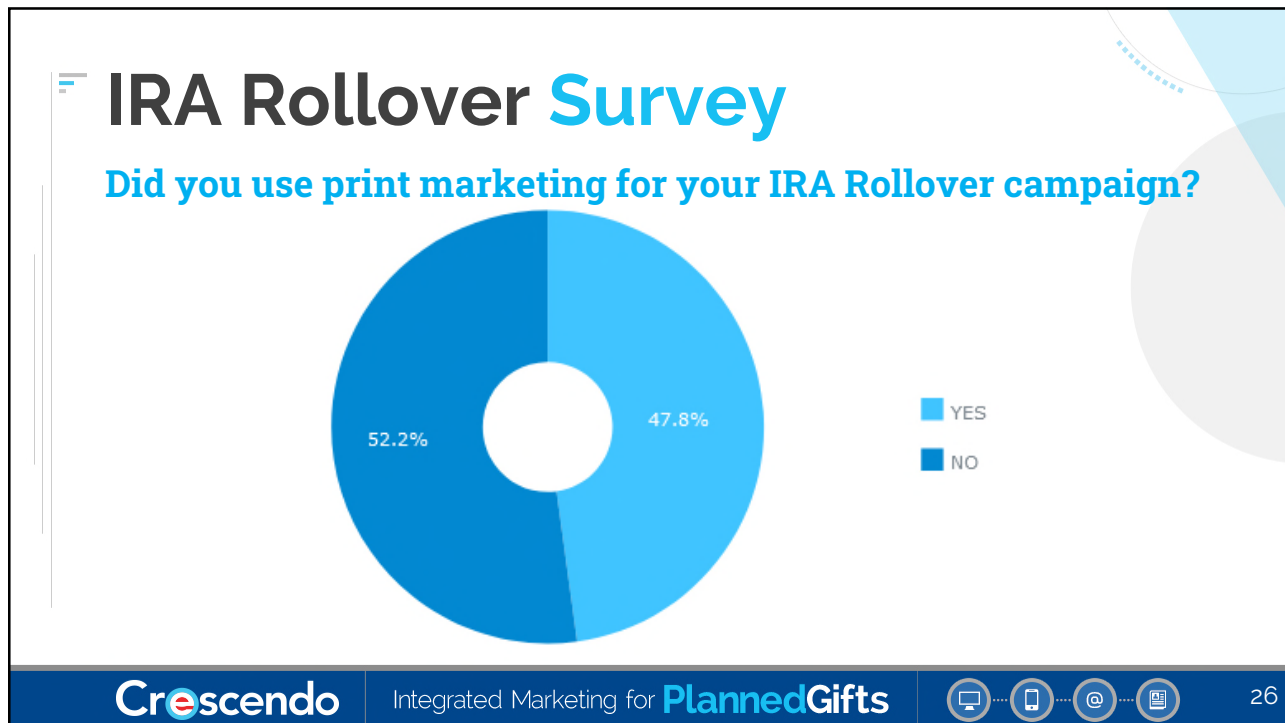
Visibility

- Media rich world
- GiftLegacy **"Adds To"** marketing





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IRA Rollover Survey

Did you use print marketing for your campaign?

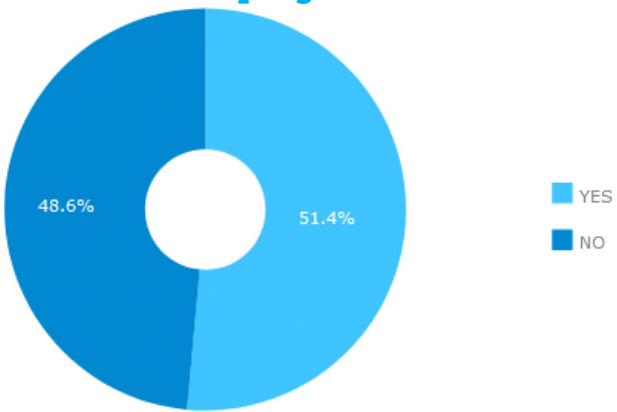
- “We promote them in our **newsletters**.”
- “We use IRA Rollover ads in our nonprofit **newspaper**.”
- “We featured a donor couple, who routinely make their gifts through their IRA RMDs. The **postcard** appealed to the practicality, efficiency and tax-wise reasons for making a gift through an IRA.”
- ★ “ While I think our marketing pieces have had a small effect, I think our donors have become more aware of this option through their accountants and advisors.”
- “Donors need to be reminded of this each year. It will take awhile for donors to really understand how to use the rollover to their advantage. “

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IRA Rollover Survey

Did you use electronic marketing (email, social media, etc.) for your IRA Rollover campaign?



Response	Percentage
YES	51.4%
NO	48.6%

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IRA Rollover Survey

Did you use electronic marketing for your campaign?

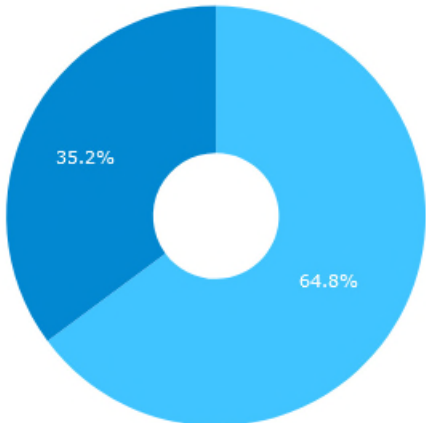
- “We used receipt stuffers, **newsletter**, and posts on **social media**.”
- “We use **social media** for the IRA rollover information. We have a handful of donors who use this gifting technique.”
- “The **social media**, on **air (radio and TV)** along with a spot in our monthly newsletters in October, November and December made a big difference but I think some nice print material would make a difference too.”
- “IRA Rollover gifts are dependent on people learning about them. That is the hard part, getting peoples’ attention.
- ★ “This needs to be promoted regularly to get the word out. Many don’t understand this option still.”

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IRA Rollover Survey

Did you receive IRA Rollover gifts from your campaign?



Response	Percentage
YES	64.8%
NO	35.2%

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IRA Rollover Survey

Did you receive IRA Rollover gifts from your campaign?

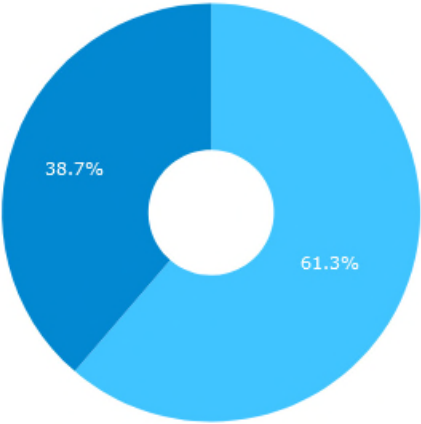
- "More donors are thinking of our organization since we have marketed."
- "We have received QMDs and RMDs from individuals as gifts to our Annual Appeal and Capital Campaign. We have promoted them in our advertising, and gifts of these types have increased within our organization."
- "We are trying to build our marketing, slowly but consistently. Just this week we received a \$100,000 IRA rollover gift."

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IRA Rollover Survey

Have your IRA Rollover gift totals increased year by year?



Response	Percentage
YES	61.3%
NO	38.7%

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IRA Rollover Survey

Have your IRA Rollover gift totals increased year by year?

- "Since the IRA Rollover Provision was made permanent we have been getting more and more gifts."
- ★ "The main takeaway for our university was to switch from a theme of tax smart strategy to funding dreams in a different manner."
- "It is an ever increasing part of our giving. Still surprised that our donors still do not know they can do it."
- "QCDs are increasing every year and I need to spend more time marketing them. A campaign might be the solution."
- "We are finding more and more alums using it. During Covid, the amounts increased."
- ★ "Our campaign was not so much a singular effort but included in every conversation and presentation as a way to increase generosity. Plans are to emphasize it more this fall."

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Case Study Children's Health

Buckslip Inserts

- In our gift receipts
- In letters

Emails

Eblast electronic postcards

To donors 70 ½ and older

**OUR PATIENTS
MAY BE TOO YOUNG
TO DREAM ABOUT
RETIREMENT –
BUT YOU'RE NOT.**



Did you know if you are over 70½ and have an IRA, you can use it to make a charitable contribution to Children's HealthSM while reducing your taxable income?

When you choose to make a Qualified Charitable Distribution directly to Children's Health from your IRA, you're not only choosing to make life better for children, but you're also choosing to help your tax situation.

Qualified Charitable Distribution benefits include:

- Reduced taxable income that is not subject to standard tax deductions
- Satisfy your required annual minimum distribution
- Fulfill your philanthropic goals

For more information on how to join others who have made their year-end gift with their IRA, or for guidance on other creative gift planning concepts, please contact Nicola Lawrence, Director of Planned Giving, at 214-456-5050 or Nicola.Lawrence@childrens.com.

This information is general and may not apply to all individuals. It is not offered as legal or financial advice but is purely educational in nature.

**I CHOOSE
CHILDREN'S**



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Case Study – Results Children’s Health

- ROI from FY 2018 to 2019 numbers testifies to the impact of an intentional marketing plan.
- The FY 2018 ROI reflect the opening FY months.
- The 2019 ROI total was just for their **six weeks** IRA Rollover campaign in FY year end 2019!

GIFT TYPE	2018	2019	Difference
IRA Rollover	\$39,638.00	\$317,779.63	\$278,141.63

156% increase in 6 weeks of campaign

Results not guaranteed and may vary.



Integrated Marketing for **PlannedGifts**



Case Study Baylor University

Baylor’s IRA Rollover marketing for FY 2016-2017 totaled 53 gifts for an ROI of \$870,413.64.

There was motivation to ...
“Let’s do this again next year!” So they did!

Oversized Postcard

- FY 2018-2019:
- IRA E-Communication October 2018
 - IRA Post Card May 7, 2019
 - IRA Follow up e-Communication May 21, 2019

Results not guaranteed and may vary.

Reduce your tax burden even if you don't itemize

IRA Charitable Rollover Gift
70 1/2 or older | Dined up to \$100,000

- Satisfies your annual required minimum distribution (RMD) up to the amount of your gift.
- Allows you to give from pretax assets and your distribution is excluded from taxable income.
- Helps avoid limits on charitable deductions and prevents you from being pushed into a higher tax bracket.
- Minimizes the effect your giving has on your cash flow. The gift is from your assets, not your checkbook.

Make Your Gift Today!
Contact Baylor's Office of Gift Planning at Long_Sam@baylor.edu or Amy_Eskel@baylor.edu or (254) 710-2351 for more information.

How to MAKE A GIFT from your IRA

- 1 Send a written request to your IRA plan administrator requesting that the distribution be made payable to Baylor University. Suggested Form letters are available at baylor.edu/ira-rollover.
- 2 Fund a written request to your IRA plan administrator (see step 1) at long_sam@baylor.edu or amy_eskel@baylor.edu or call us to know about the process. Your gift will be designated your gift. You may wish to consider designating a support scholarship at particular school, department or individual discipline.

Your gifts make a difference. Take this opportunity to support Baylor students.
baylor.edu/giftplanning

the Light

Baylor University
OFFICE OF GIFT PLANNING
One Tower Plaza #41700
Waco, Texas 76798-0200



Integrated Marketing for **PlannedGifts**



Case Study

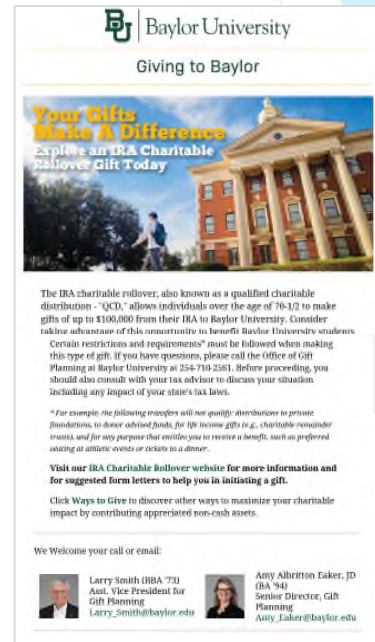
Baylor University

Electronic Contacts

FY 2019-2020:

- IRA Rollover Communication October 24, 2019
- IRA Rollover Communication March 6, 2020

In spite of the 2020 Rollover moratorium, Baylor kept their IRA Rollover momentum rolling forward!



Case Study Results

Baylor University

6/1/16 – 5/31/17	- \$870,413.64	- 53 total gifts
6/1/17 – 5/31/18	- \$1,129,832.23	- 56 total gifts
6/1/18 – 5/31/19	- \$1,668,031.05	- 113 total gifts
6/1/19 – 5/31/20	- \$2,044,929.18	- 152 total gifts
6/1/20 – 5/31/21	- \$2,045,350.91	- 123 total gifts
6/1/21 – 5/31/22	- \$4,021,614.68	- 237 total gifts
6/1/22 – 5/31/23	- \$2,866,265.17	- 258 total gifts
6/1/23 – 5/31/24	- \$4,231,047.35	- 292 total gifts



Baylor's ROI grand total dollars received from IRA charitable rollovers = \$17,000,000 +

And the Baylor marketing goes on!

Results not guaranteed and may vary.

Typical IRA Rollover Messaging

- Rollover Your IRA for Good
- The IRA Charitable Rollover Gift – It is easy to do!
- Looking for an Easy Way to Help?
- Ending the Year Well
- Your Savings, Your Legacy
- Act Now to Save on Taxes
- Reduce Your Taxes with an IRA Rollover Gift
- A Taxwise Giving Opportunity

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RIFT Letter

National Association of Charitable Gift Planners

<https://charitablegiftplanners.org/rift-2#afsc>

- **IRA Letter**



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DAFs

“Current Gifts”

Launching a Successful Donor Advised Funds Campaign

The slide features a blue background with a 3D illustration of several stylized figures in green and gold, each holding a white gift box with a red ribbon. They are gathered around a central white structure that resembles a DNA helix or a stylized 'C' shape, with two white arrows pointing upwards from the top. The entire scene is set on a circular platform with a blue and white border.

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Donor Advised Fund – Potential

- There are an estimated \$250 billion in DAF assets.
- In 2022, the DAF grants were \$52 billion.
- The value of DAF grants has approximately doubled during the past five years.
- There are approximately 1200 organizations that sponsor DAFs.
- There are nearly two million donors with DAF accounts.
- Both the number of organizations and the number of accounts have grown rapidly during the past five years.

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Donor Advised Fund (DAF)

- Easy to establish and flexible plan for charitable giving
- Donor can make gifts of cash, stock or other property to DAF
- Donor makes non-binding grant recommendations
- DAF gifts generally qualify for a full fair market value charitable deduction

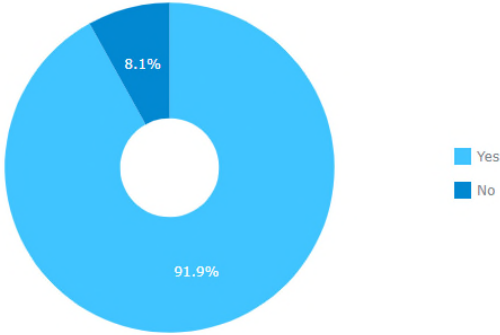


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DAF Survey

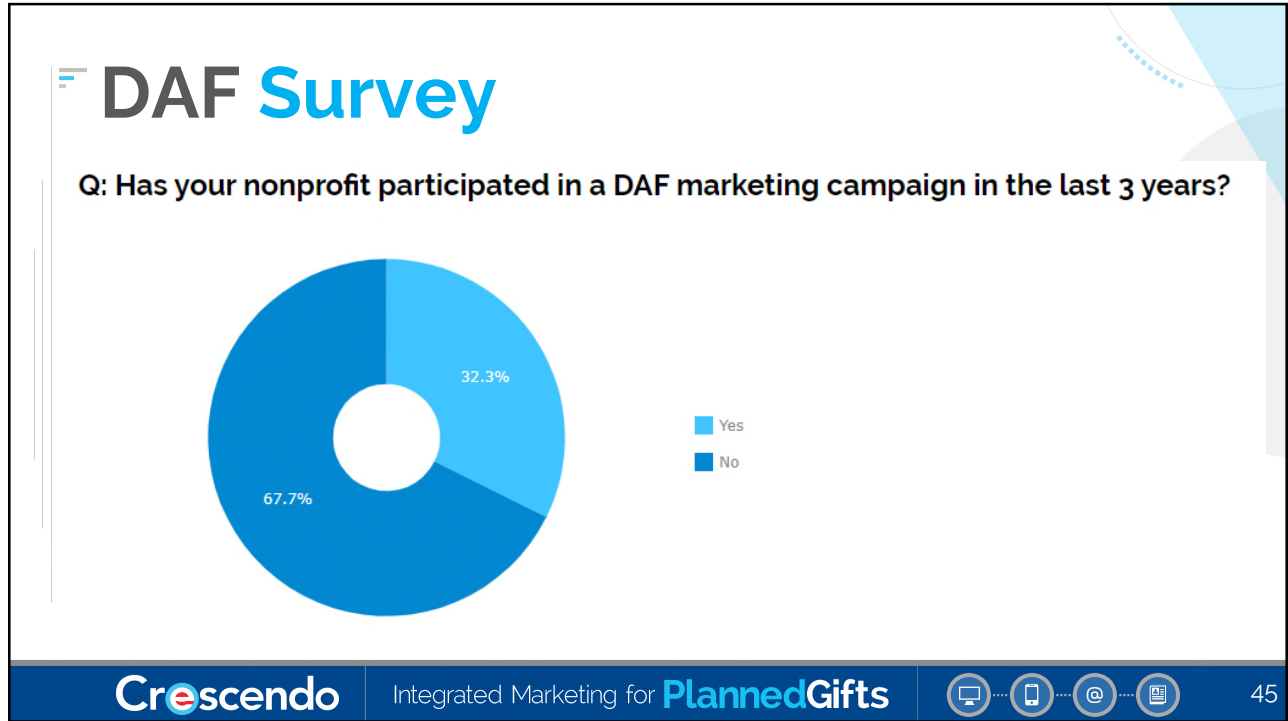
Q: Is your nonprofit tracking DAF gifts received?



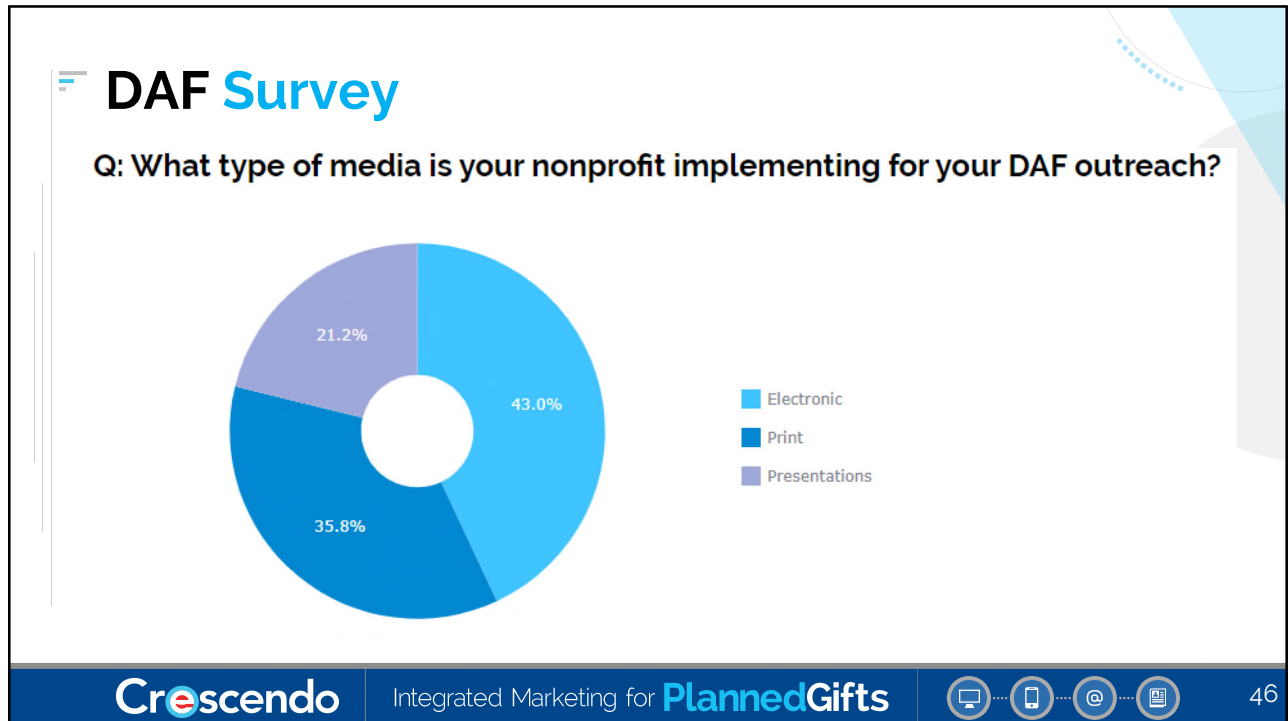
Response	Percentage
Yes	91.9%
No	8.1%

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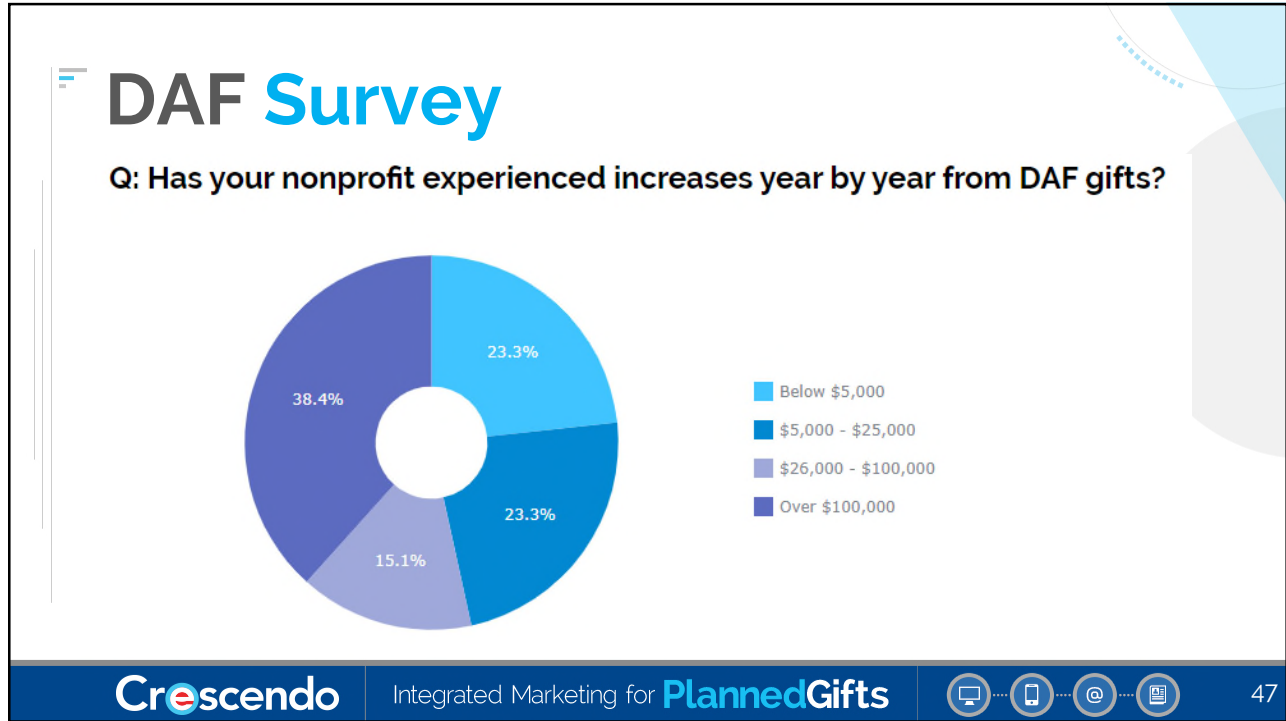
44



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DAF Survey

- Since we have implemented using the Crescendo tools for DAF, Bequests, and Surveys, it has made a difference as to who we know is giving to our nonprofit, those who are interested and we are assisting them. Those who did not know about these options are now looking into them to see about providing planned giving to our nonprofit. We did not have this in place a year ago. We are seeing more DAF, Bequests, and Estate giving than in previous years.
- I am working with a donor who gifted a piece of real estate to fund a DAF. The word is spreading and I hope to work with many more donors to use non-cash gifts to fund a DAF. I'm optimistic and appreciate your marketing pieces.
- It is hard to determine sometimes if a gift is from a Donor Advised Fund if the sponsoring organization does not include that in their correspondence. Our data entry employee sometimes cannot tell the difference between an IRA, DAF, or outright gift from a Fiduciary or Foundation, etc.
- We are hoping to increase the number of DAF gifts now that our planned giving website is up and running.
- We have over \$1M in gifts without a marketing campaign.

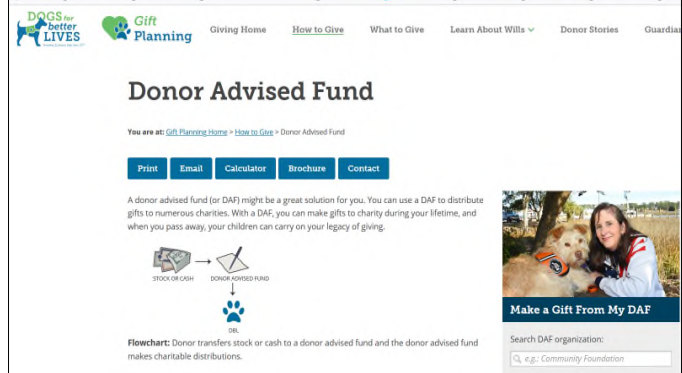
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DAF Advance Mini-Campaign

Two Campaigns of Three Weeks Each:

- Gift Legacy Website Donor DAF Story
- DAF Web Page Widgets
- DAF Eblast – Link to Website
- DAF Social Media – Link Website
- Postcard with DAF QR Code
- Ad with DAF QR Code
- DAF Four Page Donor Proposal



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DAF Marketing

- Postcard or Extended Postcard
- Eblast
- Social Media
- Advertisements
- Newsletter article



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DAF Marketing

Are you looking for a simple, flexible tool that allows you to manage and maximize your giving to support the causes that matter most to you? Are you interested in a way to simplify your annual and lifetime charitable giving?

THE ADVANTAGES OF A DAF

- Deductibility.** You may be entitled to take an immediate income tax deduction each time you make a gift. Contributions of appreciated capital assets avoid capital gains taxes.
- Flexibility.** You can give when and where you want. Take your time deciding how to designate your giving. There is no deadline for making distributions.
- Simplicity.** A DAF is easy to set up and helps you avoid the extensive bookkeeping and check-writing that is often involved in charitable giving.
- Versatility.** You can make gifts to your DAF using cash, appreciated securities and other assets.
- Multiplicity.** You can make a gift of one large asset to fund multiple charitable interests.
- Privacy.** You can designate your grants anonymously if you wish.
- Family.** You can engage your family in the journey and joy of generosity.
- Legacy.** You can ensure that your legacy continues on by leaving instructions with your heirs directing them to give. Giving from your DAF through your estate can also simplify your charitable estate bequests.

if you answered yes, you should consider a DONOR ADVISED FUND

WE CAN HELP

We would be pleased to work with you and your advisors to discuss how a donor advised fund can benefit you. If you would like to start the process or have any questions, please contact us.

Your Logo

Crescendo Interactive, Inc.
110 Camino Ruiz
Camarillo, CA, 93012
800-858-0164
crescendo@cresmail.com
www.crescendointeractive.com

NO POSTAGE
NECESSARY
IF MAILED
IN THE
UNITED STATES

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

Make a Gift That Keeps on GIVING

BUSINESS REPLY MAIL

Visit our DAF web page

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DAF Marketing

Here to Help You

To learn how a DAF can help you achieve your goals, please contact us. We welcome the opportunity to answer further questions and to answer further questions and to work with you and your advisors.

Want More Details?

- Please contact me. I want to know more about DAF benefits.
- I have included your organization in my will or trust and want to know how a DAF fits in that plan.
- Please send me your free estate planning guide.

The best way to contact me is:

Email Mail Telephone

Name _____
Street _____
City _____
State/Zip _____
Phone _____

Detail

All inquiries are handled with complete confidentiality. This information is not intended as an offer, and it should not be relied upon as an offer. Please contact your personal financial advisor for information specific to your situation.

Your Logo

Crescendo Interactive, Inc.
110 Camino Ruiz
Camarillo, CA, 93012
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Additional Benefits

New use for old stock

If you have appreciated stock, you may be concerned about capital gains taxes. Your DAF can help you. When you transfer stock to it, your fund is increased by the current value of the stock, and you pay no capital gains on that transfer.

Extra Benefits for You:

- Because charitable donations come from the account and not you, it is easy to be anonymous if you wish.
- You can pass the account to your children and grandchildren to continue your charitable legacy.

Your Giving Fund

One of the most attractive benefits might be your ability to remain anonymous. You can direct your administrator to make a gift to a nonprofit, and the nonprofit will not know it came from you.

Extra Power - An Investment Account Like No Other

One of the best benefits of the Fund is you can time your donations for maximum income tax deductibility. With your Fund, you can put money in it when it fits in your tax plan and distribute money from it when you want. This gives you the control and freedom to make contributions (and receive income tax benefits) when you choose.

Special Considerations

With a DAF, you can only advise your account administrator which charities to receive funds. Almost always your advisor will follow your advice, but in some circumstances, you may not be able to make a desired distribution. Check with your prospective administrator and ask how often they fulfill their account holder's wishes. Usually, distributions are not allowed only when the intended recipient is not a qualified charity or there is some other irregularity with the organization.

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Merriam Valley YMCA Gift Planning

DONOR ADVISED FUND

FREE NEWSLETTER | FREE ESTATE PLANNING GUIDE

You are an DAF Planning Hero

What is a DAF?

A donor advised fund (or DAF) might be a great solution for you. You can use a DAF to distribute gifts to numerous charities. With a DAF, you can make gifts to charity during your lifetime, and when you pass away, your children can carry on your legacy of giving.

How it works: Donor transfers stock or cash to a donor advised fund and the donor advised fund makes charitable distributions.

You enjoy several benefits with your donor advised fund

- Establish a flexible vehicle for annual charitable giving.
- Benefit from a more tax and cost-efficient alternative to a private foundation.
- Obtain a charitable income tax deduction in the year of your gift.

How a donor advised fund works

- You make an initial, irrevocable gift of cash or stock to fund a DAF at a sponsoring organization.
- The assets in your DAF grow tax-free.
- You make annual recommendations on gifts to be made from your DAF.

Gifts from your donor advised fund

Your donor advised fund has several advantages. You can make one larger gift to a DAF, and then recommend grants to us and other nonprofits. You can use the "Make a Gift From My DAF" tool to contact your DAF provider and make a grant. We will acknowledge your generous gift as a DAF distribution.

Contact us

For more information, please contact sales manager, chief development & marketing officer at lg@merriamvalleyymca.org or 878-882-3123.

Kimball Union Academy Gift Planning

DONOR ADVISED FUND

Our Mission | Daniel and Hannah Kimball Society | Newsletter | Estate Planning Guide

You are at: Gift Planning Home > How to Give > Donor Advised Fund

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Contact us

If you have any questions about donor advised funds, please [contact us](#). We would be happy to assist you and answer any questions you might have.

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Motivational Donor Proposals

Donor Advised Fund

Prepared for
Curly McClain

OKLAHOMA CITY
COMMUNITY FOUNDATION

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Donor Advised Fund



Prepared for
Curly McClain

**OKLAHOMA CITY
COMMUNITY FOUNDATION**

A Plan for Today with Benefits Tomorrow

Your Donor Advised Fund (DAF)

A DAF is an attractive and flexible plan for charitable giving. Your DAF permits you to recommend charitable grants each year. You may fund your DAF with a gift of cash, securities, real estate or other assets. While as a public charity we must approve the final grant decisions, we seek to honor your wishes and fulfill your charitable goals.

Savings Reduce Cost of Your DAF Gift

Your gift of \$100,000 cash may save substantial income taxes. These tax savings may be available this year. In some cases, the tax savings will be spread over two to six years. With your tax bracket of 37%, your tax savings for this generous gift are \$37,000. How much will you have in taxes and what is the cost of your gift? With a gift of \$100,000 and tax savings of \$37,000, your actual cost for this generous gift is \$63,000.

Make an Impact

Gift to Donor Advised Fund

Prepared For Curly McClain

Cash Gift \$100,000	OCCF \$100,000	Gift Benefits Gift Value \$100,000 Tax Savings \$37,000
	Tax Savings \$37,000	

- Cash gift to DAF. Income tax charitable deduction of \$100,000.
- Gift to Charity for donor advised fund. Income tax savings of \$37,000.
- Donor has satisfaction of fulfilling charitable purpose and enjoys immediate tax benefits.

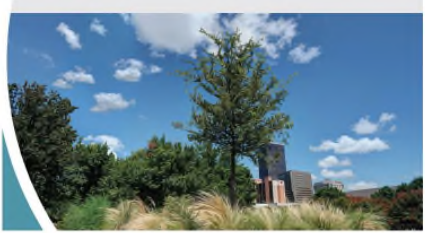
This educational illustration is not professional tax or legal advice and is not intended to address your specific situation. 8/2023/18

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Help Support Your Community

We very much appreciate your DAF gift. You and other loyal donors are an essential part of fulfilling charitable goals. A gift of cash is an excellent way for you to benefit from tax savings. It helps you achieve your personal and philanthropic goals and build a legacy for the future.



Contact Us

Your gift of cash to a DAF will make a significant difference in helping us achieve success. Please contact us to learn more. Our staff will be happy to work with you to ensure that your gift achieves your goals.

This information is not intended as tax, legal or financial advice. DAFs involve the very complex and personal financial and tax decisions for information specific to your situation.
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**OKLAHOMA CITY
COMMUNITY FOUNDATION**

Jow Carter, Director of Planned Giving
Oklahoma City Community Foundation
1000 N. Broadway
Oklahoma City, OK, 73102
j.carter@occf.org
405-235-2603

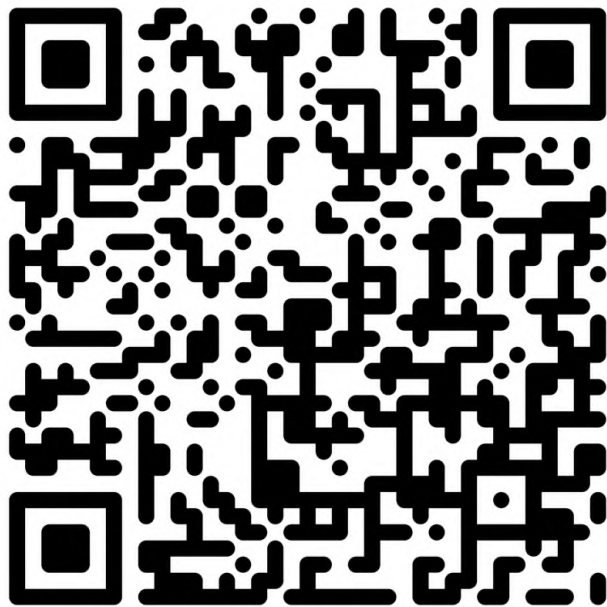
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Typical DAF Messaging

- Give on Your Terms – Donor Advised Funds
- Donor Advised Funds Give You Control
- Looking for an Easy Way to Help?
- Create Your Legacy with Your Donor Advised Fund
- Need Tax Deductions? DAFs May be Your Solution

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PPGC 2024
SAN DIEGO

SPEAKER EVALUATION

COMPLETE THE SURVEY

Please fill out the speaker evaluation by using the QR code.

Powered by CresSurvey:

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The image is a promotional graphic for Crescendo. It features a dark blue background with white and light blue text. On the right side, there is a circular arrangement of various marketing materials, including a laptop, a tablet, a smartphone, and several brochures. The brochures have titles like "Michigan Tech", "LOVER", "Getting Giving Assets", and "Support our organization in a meaningful way". The laptop screen shows a website with a child's face and the text "Create a lasting legacy with your gift".

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Planned Gifts

ADVANCE - "Current Gifts"

**IRA Charitable Rollover/QCD
DAF Grants**

800-858-9154 www.CrescendoInteractive.com

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