

Ads

Your donors are deluged with information every day. Their brains are already like soaked sponges. If you want them to absorb more, use an eyedropper, not a bucket. Remember, planned giving ads are not written to give us the satisfying feeling that we have not left anything out. They are written to catch a distracted person's attention and convey an unmistakable message at a glance. If your ad does not pass the at-a-glance test, sharpen its focus until it does.

Charitable bequests still remain the vehicle of choice for most donors who make planned gifts to good causes. A simple and effective way to stimulate charitable bequests is to encourage your donors to write or revise their estate plans. They win, their family wins, and your organization has a better chance of receiving a bequest.

You can provide estate planning information to your donors simply and inexpensively. But you must first alert your donors that they can receive an estate planning kit from you. Here are two examples of typical ads, both rather bland. You can add more interest by personalizing the text, using pictures of people similar in age to your target audience. Instead of "Three good reasons you should have an estate plan" you might have "Three good reasons we wrote our will," with a married couple pictured, if they are your target audience.. Whatever approach you take, keep the text simple and use lots of white space.

EXAMPLE ONE:

Three good reasons you should have an estate plan:

1. Your family
2. Yourself
3. Our cause (Describe your cause in a phrase, e.g., "Saving the environment")

Please send me your free estate planning kit on wills and living trusts. (Please print):

Name _____

Address _____

City _____ State ____ Zip _____

(Our organization encourages all its donors to have up-to-date estate plans. The estate planning kit is for educational purposes only and is not a substitute for legal advice. Information is provided confidentially. You may request your kit by mailing this card or by calling our organization at _____.)

EXAMPLE TWO:

Need to write or revise your will?

Call (phone number) or mail the form below for a free Estate Planning Kit from Our Development Office. And when you write your will or living trust, consider a bequest to our organization.

Yes! Please send me your free estate planning kit!

Name: _____

Address: _____

City: _____ State ____ Zip _____

Mail to: (Address)

Consult an attorney in estate planning matters.

Below is an example of a simple ad promoting charitable remainder trusts. Response to ads on this topic is usually very unimpressive. But the few calls that may result may provide you with important leads. An ad of this kind informs your donors that you can help them in this technical area and are open to inquiries.

EXAMPLE THREE

Why you may want a charitable trust:

- To sell real estate or stock without tax
- To receive income for life
- To earn an immediate tax deduction
- To provide controlled income to others
- To reduce estate tax
- To help our cause

Please send me your letter on the tax and income benefits of charitable trusts: (Please print):

Name _____

Address _____

City _____ State ____ Zip _____

(Our organization encourages all its donors to seek qualified independent counsel in establishing a charitable trust. Information from our organization in this matter is for educational purposes only. For your letter on charitable trusts, complete and mail this card or call our organization at _____.)

EXAMPLE FOUR

Below is an example that informs donors in low-interest rate times of the advantages of a charitable gift annuity. Those attracted to gift annuities want to know the numbers, so this ad provides them. The actual rates will likely have changed before you use this format, so don't rely on numbers given here. The rates given here are for illustration purposes only. Up-date the rates by visiting the website of the American Council on Gift Annuities.

A gift that pays *you!*

A charitable gift annuity provides you with

- Guaranteed fixed payments for life
- An immediate income tax deduction
- Partially tax-free payments and capital gains bypass
- The satisfaction of making a gift to Our Organization

Mary Richards, age 75, funds a \$10,000 charitable gift annuity contract to benefit the Our Organization. Her annuity payment is 5.8% of her gift, giving her an annual guaranteed payment for life of \$580. \$469 of her payment is tax-free for eleven years. She also receives an immediate income tax deduction of \$4,186. A gift annuity is simple to create. You must be at least 60 when the payments begin and your annuity must be created with an amount of at least \$10,000. To find out your tax and payment benefits, call (contact information) for a confidential gift annuity analysis with no obligation

Age	Current Rates
60	4.4%
65	4.7%
70	5.1%
75	5.8%
80	6.8%
85	7.8%
90+	9.0%

Rates differ for two-life annuities.

For an estimate of your payment amount and income tax deduction, call: