

Writing Your Case Statement

Imagine the case given here presented in a four-page format, about the size of a typical newsletter, with lots of white space and strong pictures. (The Coach does not believe in quietly understated planned giving promotions.)

Your first job is to summarize in a memorable way why your organization needs and deserves planned gifts. Think of what your organization would do with planned gifts if they had them in abundance. Capture that in headline. For example, Academy High School's planned giving program has a clearly focused goal: to build a \$50 million endowment that will allow the school to admit students who are academically qualified but in need of financial help. The school is trying to appeal to loyal older graduates who realize they received an excellent education from Academy's years ago when their families, most of them of modest means, could afford the tuition before the cost of a private education soared. The case is summarized in the headline "Open a door once opened to you"

The school then spells out the case in specific dollar terms needed for specific purposes. The endowment-fund numbers, left blank here, were filled in by the school that is the model for this example. Not every nonprofit may want to be so specific in public, but your organization should at least have a formally approved dollar goal for its planned giving program and should specify how it plans to use the funds received.

Once you have a draft of the case, work it through the board committees – planned giving, development, and finance – revising it as you go. Do not move it from one committee to the next without at least one planned gift commitment from a committee member. By the time you and your volunteers present the case to your board, many board members will be familiar with it and committed to it. Once the case is approved by formal resolution, your volunteer planned giving advocates can speak with confidence to others. They will know the case.

Open a door...

(Old photo of student from years ago entering Academy High)

...Once opened to you

(Photo of students from the fifties at student rally outside of school)

Few families who sent their sons to Academy High from the 1950s through the early 1960s could afford to bear the real cost of a private high school education today. Forty years ago, teacher salaries, though modest, were adequate to meet the cost of housing near the school. The relatively low cost of running Academy High allowed the school to accept almost all qualified students regardless of financial circumstances. Today, tuition puts an enormous burden on families who are too well off to qualify for full financial aid but not well off enough to meet tuition without serious strain. An increased endowment is needed to keep our doors open to those who need us most.

Endow Academy High with a stroke of the pen

Through a charitable bequest in your will or living trust, you can ensure that Academy High will keep its doors open to qualified students whose families cannot afford the full cost of a private high school education. This thoughtful act, which has little or no current financial impact on you, may result in the largest and most lasting one-time gift you ever make to the school.

Immediate tax and income benefits

You can also transfer cash, stock or real estate to a charitable trust which distributes annual payments to you for life. This trust will never pay capital gains tax on the sale of appreciated assets, will provide you with an immediate charitable income tax deduction and ensure a future gift to Academy High.

We want to thank you now

Our Legacy Circle provides lifetime recognition to donors who have included the school in their estate plan. All you need do is tell the school that your plan is in place and that you have no objection to being publicly listed in the Legacy Circle honor roll.

Open a Door...

Your choice: tuition support or specific programs

You may direct your bequest to a special area of interest: tuition assistance, academic or ministerial programs, teacher development or campus maintenance.

Endow Academy High is an endowment campaign to raise endowment funds to the following levels:

<i>Endowment Fund</i>	<i>Current level</i>	<i>Goal</i>
TUITION ASSISTANCE FUND to assist working families for whom full tuition presents an overwhelming burden	\$_____	\$_____
CURRICULUM & PROGRAM FUND to provide additional support for special programs such as fine arts, advanced science and technology instruction, and special programs for those with learning problems.	\$_____	\$_____
EXCELLENCE IN TEACHING FUND to provide advanced training, merit opportunities and professional development for the teaching faculty	\$_____	\$_____
CAMPUS MAINTENANCE FUND to ensure that the campus buildings and grounds are maintained in their present "like new" condition	\$_____	\$_____
Total	\$_____	\$_____

It's not that hard

Academy High offers information on a variety of ways to make your commitment:

- **A Charitable Bequest:** Instruct your attorney to add a charitable bequest for Academy High to your estate plan for a specific amount, a specific property, or for a percentage of the estate.
- **Retirement Plans:** Designate Academy High to receive part or all of what remains of your retirement plan after your death. Such transfers can be a very tax-efficient way of making a gift. For example, heirs may receive as little as 30% of a retirement plan from a large estate after estate tax and income tax. Academy High will receive all of it tax-free.
- **Insurance policies:** Designate the Academy High endowment to receive all or part of the proceeds of a life insurance policy. Ask your insurance company for a beneficiary designation form.
- **A Charitable Remainder Trust:** Call Academy High for a confidential analysis of the tax and income benefits available to you and your family through a charitable remainder trust.

To those who share its vision

Academy High offers:

- Professional management of gift principal year-after-year;
- The full tax advantages of a qualified nonprofit organization;
- Information on the tax and income benefits of charitable remainder trusts and donor-advised funds.

(For confidential information on making our planned gift commitment to Academy High, call (Name of contact person and phone.)

(Text for response card)

Send me information on (please check):

The benefits of including Academy High in my estate plan

Why retirement plans make great charitable gifts

The tax and income advantages of charitable trusts

Name _____

Address _____

City _____ State ____ Zip _____

Check if applicable: Academy High is already in my estate plan.

