

## Brochure

Your general planned giving brochure should be a concise and graphically interesting summary of your case statement. (Much of the information given here is also found in *Your Case* under *Getting Started*. A more detailed explanation on developing the case statement is found in *Using the Case*, also under *Getting Started*.)

Imagine the template below 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 a 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 need 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. 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 needs 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. Here, then, is a template for your planned giving brochure:

# *Open a door...*

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

*(The following elaborates on the case.)*

## ***...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. 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.

### ***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 gifts 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 Heritage Society provides lifetime recognition to donors who have included the school in their estate plan. All you need to do is tell the school that your plan is in place and that you have no objection to being publicly listed in the Heritage Society 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. Academy High's **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>
<b>TUITION ASSISTANCE FUND</b> to assist working families for whom full tuition presents an overwhelming burden	\$ _____	\$ _____
<b>CURRICULUM &amp; PROGRAM FUND</b> to provide additional support for special programs such as fine arts, advanced science and technology instruction, and classes for those with learning problems	\$ _____	\$ _____
<b>EXCELLENCE IN TEACHING FUND</b> to provide advanced training, merit opportunities and professional development for the teaching faculty	\$ _____	\$ _____
<b>CAMPUS MAINTENANCE FUND</b> 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:

- \* **Retirement Plans:** Designate Academy High to receive part or all 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 would receive it all of it tax-free.
- \* **Insurance policies:** Designate 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 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.
- \* **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.