

What You Can Expect From Our Gift Planner?

Sometimes a gift to [ABC] Charity requires a good bit of planning. The size of the gift, the type of asset, the need for retirement income, the tax consequences, the coordination of the gift plan – these are a few of the questions and concerns a donor may face.

To help with the gift planning process, [ABC] offers the services of a gift planning officer. Her name is Jane Doe and she is available to assist you. What can you expect from Ms. Doe as our gift planner?

1. She will honor your confidences. Making a gift out of your estate assets may touch sensitive concerns regarding personal wealth and family expectations. Sharing your goals and desires can arouse anxious feelings. Ms. Doe will be sensitive to your concerns and will respect privacy.

2. She will provide useful information. Ms. Doe has a wealth of information about various gift vehicles and the opportunities available to you here at [ABC] Charity. She can also provide tailor-made illustrations showing the workings and benefits of a particular planned gift.

3. She will meet with your advisors. Sometimes a gift plan can be confusing and difficult to explain. Ms. Doe is able to discuss the plan in detail with your advisors so they have a good grasp of what you desire to do. This can often save you time and expense.

4. She will help coordinate your plan. Ms. Doe is good at fitting all the puzzle pieces together. She will help orchestrate the gift process with a checklist of steps and will encourage the various parties ([ABC] Charity, your professional advisors, etc.) to meet your planning deadlines. She'll move the process along and make your gift giving more enjoyable for you.

5. She will provide ongoing contact. Once your gift is made, Ms. Doe will maintain contact with you to ensure that you are informed about the results of your gift and to keep you in close touch with [ABC] Charity.

While Ms. Doe can assist you in planning your gift, there are some things she will not do. She will not twist your arm to get a gift for [ABC].

She will not purposefully hide important information from you. Nor will she attempt to be your legal or financial counselor. In fact, for your protection, she will insist that you obtain independent counsel from your own professional advisors before you make your gift.

We greatly appreciate our generous friends who carefully plan their gifts. If you would like Ms. Doe to help you in this process, please call her at 888-613-4567. You will enjoy getting to know her.

(Please complete and return this reply form)

Dear Friends at [ABC] Charity:

- ☐ Please send me free literature about making a planned gift.
- ☐ Please contact me about a personal visit or other assistance.
- ☐ I have already included [ABC] Charity in my estate plans.
- ☐ Please send me information about the [ABC] Heritage Society.

Name: _____

Address: _____

City: _____

Province: _____ Postal Code: _____

Phone: _____

Email: _____

Mail this form to:
[ABC] Charity, 123 Main Street, Anytown.