FERRARI PHILANTHROPIC
CONSULTANTS

Amanda J. Ferrari, JD, CFRE

Amanda J. Ferrari, JD, CFRE and her partner, Robert Sheldon, JD are the principals of Ferrari Philanthropic Consultants, Inc., a full service Consulting Firm with over 30 years of combined fundraising and philanthropic expertise providing counsel to Nonprofit Organizations in Estate and Gift Planning, Bequests, Major Gifts, Feasibility Studies, Capital Campaigns, Endowment Campaigns, Executive Coaching, Fundraising and Business Plans, Board and Staff Leadership Development, Strategic Planning, Nonprofit Management, Leadership Retreats, and Marketing.

Most importantly, Amanda works closely with donors, their advisors, and Board members in Orange, Los Angeles, Riverside, and San Bernardino Counties with such noted charitable organizations as St. Joseph Hospital of Orange, Mission Hospital, St. Jude Medical Center, St. Mary Medical Center, Laguna Beach Community Foundation, Southern California College of Optometry, Orange County Performing Arts Center, the California Science Center, the Los Angeles Biomedical Research Institute at Harbor UCLA, The Muzeo, just to name a few.

Amanda was named the 1997 Association of Fundraising Professional's Outstanding Fundraising Executive for Orange County.

Amanda is actively involved in or serves on Boards of the Planned Giving Round Table, the Association of Fundraising Professionals in Orange County and the Orange Coast Estate Planning Council. She is a Past President of both PGRT-OC and AFP-OC.

Amanda holds degrees from the University of California, Riverside and UCLA, and her Juris Doctorate from Western State University College of Law. She has been an adjunct professor at California State University, Long Beach with the American Institute for Philanthropic Studies and also at the University of California, Irvine extension program.

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PARAGON
CHARITABLE SERVICES GROUP, INC.

Douglas J. Corbin, CSPG

Douglas J. Corbin is President of Paragon Charitable Services Group, Inc. Mr. Corbin has over 18 years of experience in the field of gift planning, notably serving as the Assistant Vice Chancellor for Estate and Gift Planning at Pepperdine University from 1996-2002 before forming Paragon in 2003. Over the years, Doug has served as gift planning counsel to such notable charitable organizations as The Motion Picture & Television Fund; The Ronald Reagan Presidential Foundation; The Los Angeles Urban League; The California Science Center; The California Highway Patrol 11-99 Foundation; The Cathedral of Our Lady of the Angels; Children's Hospital of Orange County; and The Los Angeles Chamber Orchestra.

Mr. Corbin holds a Bachelor of Science Degree in Kinesiology from Pepperdine University (1974) and a Certified Specialist in Planned Giving designation from the American Institute of Philanthropic Studies at Cal State Long Beach (1995) where he has served as a guest lecturer since 2005. He is a member of the Crescendo Gift College faculty and has authored a book "The Enlightened Advisor – The Life Underwriters Comprehensive Guide to Long-Term Success in the Charitable Marketplace" (2004).

In 2008, Mr. Corbin was elected to the Mission Hospital Foundation Board of Directors where he is currently serving a three-year term. He also serves on the Board of Directors of the Planned Giving Roundtable of Orange County and is a past board member of the Planned Giving Round Table of Southern California (2004-2005). As a volunteer, Doug is Founder and President of Ryan's Reach - The Ryan Corbin Foundation for Brain Injury - and is an active donor to a number of worthy charitable organizations.

Doug and his wife Victoria have three children, Ryan, Jessica, and Alyssa, and reside in Dove Canyon, California.

Jeri Stathis, CSPG
Director Trust and Estates
CHOC Foundation

Jeri Stathis, CSPG, is Director of Trusts and Estates for CHOC Children's Hospital Orange County. Stathis is a member of the 2008/2009 Board of Directors for the Partner for Philanthropic Planning of Orange County. She is an active volunteer at CHOC in the Spiritual Care in Hannah's Gifts. Prior to her tenure at CHOC, Stathis served as Director of Major Gifts and Planned Giving at the Alzheimer's Association in Irvine, CA. Stathis sat on the Board of Directors for the Susan G. Komen Breast Cancer Foundation, where she has served as Director of Race for the Cure, Director of Education and Director of Fund Development. She attended the University of Kansas, and recently obtained her CSPG from the American Institute of Philanthropic Studies.

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I. What is being marketed?

- Bequests in Wills
- Living Trusts
- Retirement Plan Assets
- Charitable Gift Annuities
- Charitable Remainder Trusts

These vehicles are the most widely marketed planned giving techniques among the top fundraisers. These are the easiest techniques to market because they're straight forward and easy to explain.

II. What are the objectives of the Marketing Plan?

The three (3) main objectives of the Planned Giving Marketing are:

A. To influence new planned gifts internally and externally,
B. To discover gifts already planned, and
C. To build strong relationships with current donors and donor prospects and their advisors.

III. Priorities

A. Face to Face Cultivations
B. Engaging the Board of Directors
    A. What is the cost of a Planned Gift vs. a Major Gift vs. Special Events vs. Direct Mail etc. etc.?
C. Profile Existing Donor Database & Identify Prospects
D. Planned Giving Presentations
E. Marketing Materials
F. Professional Advisors
G. Legacy Society - Recognition

IV. Why Engage The Board?

A. Ambassadors

1. They have starring roles in cultivation of prospective donors and stewardship of continuing donor-investors
2. Catalysts for donor-investor renewal

IV. Why Engage The Board? (con't)

B. Advocates

1. On the golf course or in the car pool – these individuals are strategic in their information sharing
2. They advocate for you on many levels.
3. Are informed not only of the case for support, but also are well integrated into your strategic plan and vision
4. Are well coached on desired results of the advocacy and handling objections

IV. Why Engage The Board? (con't)

C. Askers

1. Enjoy asking important potential donors to support a cause they believe in.
2. Are usually well informed and well trained

V. Marketing Plan

A. **Face to face** personal cultivation and gift request –
   1. Personal Visits
   2. No Gift Left Behind
B. Recognize and Thank Loyal Planned Gift Donors
C. Meet with revocable gift donors to see if an irrevocable planned gift would be beneficial or accelerate their gift
D. Repeat CGAs

V. Marketing Plan (con't)

E. CRUT additions
F. Irrevocable designation for CRUTs and CRATs
G. Early termination of a CGA, CRUT and/or CRAT
H. Engage Board in "Peer to Peer" Solicitation of a Planned Gift
I. Develop a list of top 25 –50 Planned Gift Prospects

VI. Profile Existing Donor Base for Planned Giving Prospects

A. Identify new Planned Giving Donor Prospects based on profile criteria:

1. **Giving history**
2. **Age**
3. **Capacity**

VI. Profile Existing Donor Base for Planned Giving Prospects

B. Steward donors who have consistently given to your organization regardless of amount (i.e. donors who have given 5 of the last 10 years)

VII. Planned Giving Presentations

A. Planned Giving Presentations to scheduled meetings of Board of Directors, Volunteer Groups, etc. – Testimonials, specific gift strategy
B. Seminars to Board and Major Gift Donors and Identified Planned Giving Donor Prospects – Specific Topic, i.e. IRA Rollover, CGA, Planned Gift vs. Outright Gift
C. Planned Giving Education to Major Gift Officer, Campaign Officers – Empower development professionals to discuss, explore and market planned gifts to their prospects
D. Personal Follow-up phone calls and meetings are critical to the success of any Planned Giving Presentation

VIII. Marketing Materials

A. Specific Marketing Brochure
B. Planned Giving Articles in existing Publications – At least quarterly
C. Specific Planned Giving Newsletter – At least quarterly
D. Planned Giving Information on existing Website – Not a substitute for Planned Giving education, but a tool

VIII. Marketing Materials (con't)

E. Postcards - mail regarding specific gift strategies, IRA Rollover, Real Estate and Stocks, CGAs, and donor story
F. A "buckslip" with bequest message and legal name of organization to be included in gift receipts, other mailings and at appropriate special events
G. Create specialize "buckslip" regarding specific gifts, i.e., Bequests, CGA, etc.
H. Provide suggested language for Wills, Living Trusts, and Retirement Plans
I. Send Birthday, Anniversary and Holiday Cards

IX. Professional Advisors – Offer Service and Expertise

A. Develop personal relationships with Key Professional Advisors – Tell the story; Offer opportunities to learn about, interact with and experience your organization.
B. Invite Key Professional Advisors to attend CEO Roundtable, Leadership Council, etc.
C. Invite Key Professional Advisors to Tour your facility and organization
D. Meet with the Professional Advisors of the Planned Gift Prospects, Personally deliver gift proposals and illustrations to the advisor

Mission of the Council & Term of Office

- Mission: To support the Foundation's goals and strategic decisions by serving as emissaries to potential donors and their advisors, providing education and access to the Foundation's professional services, and by serving as consultants on issues and opportunities under consideration by Foundation leadership.
- Term of Office: A council member serves a three-year term. To enable new individuals to join, a member is typically elected to a maximum of two consecutive three-year terms but is eligible to serve successive terms after the second term at the discretion of the electing body.

COUNCIL COMPOSTION AND QUALIFICATIONS

- The Professional Advisory Council will be comprised of 10-12 members and chaired by an individual approved by Foundation leadership. Members of the Council will be professionals in fields allied with estate and gift planning including estate planning attorneys, CPA's, CFP's, life underwriters, trust officers, investment advisors, real estate brokers and retired estate planning professionals. Members may also be individuals with specific skill sets outside the field of estate and gift planning that may be of value to the organization.

- Members of the Professional Advisory Council should be individuals who subscribe to the mission and purpose of the Foundation; are technically proficient in their respective field; are ethical and moral in their business practice; and who willing to share the mission of the Foundation with their clients and other potential donors.

RESPONSIBILITIES OF THE COUNCIL

- Attend a minimum of two quarterly meetings per year
- Actively participate in the functioning of the council
- Be available to the Executive Management Team
- Occasionally accompany a Foundation director, officer, or staff member for personal solicitation of selected prospects
- Advise the Board of Directors on matters related to the development and execution of gift planning policy and procedures
- Educate potential donors and their advisors as to the mission and scope of services provided by the Foundation and, where appropriate, assist in identifying the donor's individual planning needs and assist the donor's advisors in structuring a giving program responsive to those needs, insofar as any recommendation is in the best interest of the donor
- ***Any assistance given by any member of the Professional Advisory Council should not be construed as rendering advice. In all cases, donor prospects are advised to obtain their own independent counsel before taking action.**
- Monitor current and developing legislation related to the field of estate and gift planning and be available to the Foundation's Board of Directors for input on legal and technical matters relating to the gift planning program.

Planned Giving Quick Facts

- 851 universities/colleges in the U.S. reported planned giving revenue in 2007. 12.39% was from planned giving and 80.19% of the planned giving totals were from bequests.
- The average number of bequests reported per institution was 18, with an average bequest size of $162,282.*
- **2007 Voluntary Support for Education Survey*

- *CHOC Children's reported 8 realized bequests in FY08, for a total of $1,288,693; an average of $161,086 per bequest.*

X. Legacy Society- Invite Individuals to Join, Thank Them, and Steward Planned Giving Donors

A. Create or increase Membership in your Legacy Society
B. Involve Legacy members with your organization
C. Involve Legacy members with other Planned Giving Prospects

XI. Evaluations & Expectations

A. Based on Best Practices - The key to finding success with any marketing plan is consistent and frequent communication. Marketing is a building process.

XI. Evaluations & Expectations (con't)

B. In evaluating successful Planned Giving Program and reviewing expectations, two items seem to standout:

1. Never, never, ever, abandon the basics - Wills and bequest program; CGAs and CRUTs
2. Stewardship…stewardship…stewardship leads to planned giving prospects. Stewardship, in and of itself, is a powerful marketing tool to enhance giving to your organization.

WHEN Charity SPENDS $ 1.00 TO RAISE MONEY…………..HERE'S THE RETURN

CATEGORY	Cost to Raise $1.00	Portion Charity Keeps	Fund Raising Efficiency
Entry Level Gifts			
Direct Mail-Acquisition	$ 1.00	$ -	0%
Direct Mail- Renewal	$ 0.80	$ 0.20	20%
Special Events	$ 0.50	$ 0.50	50%
Annual Gifts	$ 0.40	$ 0.60	60%
Major Gifts			
Individual, Corporate, Foundation	$ 0.20	$ 0.80	80%
Endowment Fund (Planned/Estate Gifts, Trusts, Wills)	$ 0.05	$ 0.95	95%

How To Include ABC Hospital In Your Will, Living Trust and/or Retirement Plan

Specific Language……..

- ***PERCENTAGE: "**I give, devise, and bequeath to ABC Hospital for the support of **[Endowment, a Specific Programs, etc.]** which is located at 1234 Main Drive, Any Town, in the County of Orange, in the State of California, _______% of the residue of my estate."

Specific Language…….. (con't)

- ***DOLLAR AMOUNT** **"**I give, devise, and bequeath to ABC Hospital for the support of **[Endowment, a Specific Programs, etc.]** which is located at 1234 Main Drive, Any Town, in the County of Orange, in the State of California, the sum of $__________________."

Specific Language…….. (con't)

- ***SPECIFIC PROPERTY** **"**I give, devise, and bequeath to ABC Hospital for the support of **[Endowment, a Specific Programs, etc.]** which is located at 1234 Main Drive, Any Town, in the County of Orange, in the State of California, my interest in:
- Real property - describe the property and exact location
- Art work - describe each art piece
- Securities - describe which stocks, bond, etc.

Specific Language…….. (con't)

***RETIREMENT PLAN** In the beneficiary designation of your IRA, 401(K), 403(B), or any qualified retirement plan, give a percentage, i.e. 100%, 50%, etc. to ABC Hospital.

Thank You !!!!

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The Case for Forming

THE CHOC CHILDREN'S FOUNDATION
Professional Advisory Council

Nonprofit organizations such as the CHOC Foundation are increasingly turning to Professional Advisory Councils to perform a variety of functions. More than one-third (37%) of the 1,300 respondents to a recent survey conducted by BoardSource and Stanford University indicated that their organization has an advisory council in addition to its governing board.

Professional Advisory Councils can add significant value in advancing the mission of an organization if they are created with a clear purpose and an accompanying strategy. An advisory council's reason for existence should be real, legitimate, and important and can open many doors of opportunity for the sponsoring nonprofit organization. When constructed properly, it will:

- Bolster the organization's impact on your internal donor community
- Add vital support and focused expertise
- Bring intellectual, social, and political capital to the table
- Perform tasks that are critically important to the organization such as identifying and motivating new donors to support the CHOC Foundation's mission

Professional Advisory Councils are traditionally comprised of 10-12 individuals including, but not limited to:

- Estate Planning Attorneys
- CPA's
- Business Managers
- Wealth Managers
- Financial Planners
- Bank & Trust Officers
- Real Estate Professionals
- Life Insurance Professionals

Overall, Professional Advisory Councils provide a specialized expertise that may be missing from your current board or staff. Council members can serve as ambassadors for the organization, building bridges into the communities they serve and fostering a sense of accountability. When well organized and given a clear sense of its goals, a Professional Advisory Council can do much to help an organization fulfill its mission.

FERRARI PHILANTHROPIC CONSULTANTS

"ABC HOSPITAL"

HOW TO INCLUDE THE ABC HOSPITAL IN YOUR WILL, LIVING TRUST AND/OR RETIREMENT PLAN

By including the ABC Hospital in your will, living trust and/or retirement plan, you can ensure that your annual support will continue in perpetuity.

There are several ways to make an estate gift to the ABC Hospital:

***PERCENTAGE:** "I give, devise, and bequeath to the ABC Hospital for the support of **[Endowment, a Specific Programs, etc.]** which is located at 1234 Main Drive, Any Town, in the County of Orange, in the State of California, _______% of the residue of my estate."

***DOLLAR AMOUNT** "I give, devise, and bequeath to the ABC Hospital for the support of **[Endowment, a Specific Programs, etc.]** which is located at 1234 Main Drive, Any Town, in the County of Orange, in the State of California, the sum of $___________________."

***SPECIFIC PROPERTY** "I give, devise, and bequeath to the ABC Hospital for the support of **[Endowment, a Specific Programs, etc.]** which is located at 1234 Main Drive, Any Town, in the County of Orange, in the State of California, my interest in:

Real property - describe the property and exact location
Art work - describe each art piece
Securities - describe which stocks, bond, etc.

***RETIREMENT PLAN** In the beneficiary designation of your IRA, 401(K), 403(B), or any qualified retirement plan, give a percentage, i.e. 100%, 50%, etc. to the ABC Hospital.

Your estate gift may be unrestricted as to its use or restricted for a specific purpose.

Should you have any questions regarding an estate gift to the ABC Hospital please call Amanda J. Ferrari, JD, CFRE, at 949-661-1797.

PLANNED GIVING RESOURCES

Partnership for Philanthropic Planning – Orange County

www.pppoc.org
Gail A. James, Executive Director
1442 E. Lincoln Ave., PMB 441
Orange, CA 92865-1934
Phone: 866-921-6440
Fax: 866-921-6443
info@pppoc.org

Partnership for Philanthropic Planning – National

www.pppnet.org

Planned Giving Design Center
www.pgdc.com

American Council on Gift Annuities
www.acga-web.org

It's Your Money Workshop
It's Your Estate Workshop
Peter Kote - 949.683.7048

Orange County Community Foundation
www.oc-cf.org

American Institute for Philanthropic Studies – CSU at Long Beach
CSPG – Certified Specialist in Planned Giving
www.plannedgivingedu.com

Crescendo
www.crescendointeractive.com

The Stelter Company
www.stelter.com