ABOUT THIS REPORT

According to research of giving patterns since 1966 compiled by the Giving USA Foundation, only bequests averaged an increase during recessionary periods. All other types of giving either remained static or reported declines.

But is your planned giving program getting its fair share of the marketing budget?

We scoured the internet to find the following awesome information. And, although we can’t take credit for the research, we can take credit for the pretty charts!

So feel free to share this report with colleagues and friends (including your board).

And when you’re ready to engage in serious marketing to find hidden gifts, generate leads and cultivate relationships, we hope you’ll give us a call. After all, our mission is to help further your mission.

ENJOY THE REPORT!
The greatest transfer of wealth ever is upon us. $41 trillion is expected to transfer even in light of current economic conditions.

$12 TRILLION WILL GO TO CHARITY

THE INTERGENERATIONAL TRANSFER OF WEALTH
2000-2050

ESTIMATED TRANSFER OF WEALTH

ESTIMATED TRANSFER OF WEALTH TO CHARITY

$ IN TRILLIONS

2000 2020 2050

$ in trillions

2000 2020 2050

0 5 10 15 20 25 30 35 40 45

Family Philanthropy And the Intergenerational Transfer of Wealth
OR $24.8 TRILLION COULD GO TO CHARITY

<table>
<thead>
<tr>
<th></th>
<th>LOW ESTIMATE (2% secular real growth in wealth)</th>
<th>MIDDLE ESTIMATE (3% secular real growth in wealth)</th>
<th>HIGH ESTIMATE (4% secular real growth in wealth)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Number of Estates</strong></td>
<td>87,839,311</td>
<td>87,839,311</td>
<td>87,839,311</td>
</tr>
<tr>
<td><strong>Value of Estates</strong></td>
<td>$40.6</td>
<td>$72.9</td>
<td>$136.2</td>
</tr>
<tr>
<td><strong>Estate Fees</strong></td>
<td>$1.6</td>
<td>$2.9</td>
<td>$5.5</td>
</tr>
<tr>
<td><strong>Estate Taxes</strong></td>
<td>$8.5</td>
<td>$18.0</td>
<td>$40.6</td>
</tr>
<tr>
<td><strong>Bequests to Charity</strong></td>
<td>$6.0</td>
<td>$11.6</td>
<td><strong>$24.8</strong></td>
</tr>
<tr>
<td><strong>Bequest to Heirs</strong></td>
<td>$24.6</td>
<td>$40.4</td>
<td>$65.3</td>
</tr>
</tbody>
</table>


* All dollar values are in trillions of 1998 dollars.
“FOR THOSE WHO THINK THE GENERATIONAL TRANSFER WILL AUTOMATICALLY FLOOD THEIR ORGANIZATION WITH RESOURCES,

IT’S TIME TO THINK AGAIN.

WITHOUT PUTTING IN THE HARD WORK OF GENERATING THESE PLANNED GIFTS, 90% OF DONOR MORTALITY WILL SIMPLY RESULT IN LOST CURRENT GIVING.”

Causes and Correlates of Charitable Giving in Estate Planning: A Cross-Sectional and Longitudinal Examination of Older Adults—Russell N. James III, J.D., Ph.D.

www.imarketsmart.com
Only 5.3% of older Americans have made a charitable bequest commitment, while 33% are willing to consider such a gift.
AMONG THOSE OVER AGE 50 WHO WERE DONATING MORE THAN $500/ YEAR TO CHARITABLE ORGANIZATIONS…

< 9.5%

LESS THAN 9.5% HAD A CHARITABLE ESTATE PLAN.

Causes and Correlates of Charitable Giving in Estate Planning: A Cross-Sectional and Longitudinal Examination of Older Adults—Russell N. James III, J.D., Ph.D.

www.imarketsmart.com
ULTIMATELY ONLY 10%-12% OF DONORS WILL DIE WITH ANY CHARITABLE ESTATE PROVISION

10-12%
ONLY 37% OF THOSE OVER AGE 30 SAY THEY ARE FAMILIAR WITH THE TERM “PLANNED GIVING”

63% UNFAMILIAR WITH THE TERM “PLANNED GIVING”

37% FAMILIAR WITH THE TERM “PLANNED GIVING”
Only 22% of those over age 30 report that they have been approached to consider a planned gift.

78% have not been approached to consider a planned gift.

22% have been approached to consider a planned gift.
TOP REASONS DONORS MAKE PLANNED GIFTS:

97% DESIRE TO SUPPORT THE CHARITY
82% THE ULTIMATE USE OF THE GIFT BY THE CHARITY
TOP REASONS DONORS MAKE PLANNED GIFTS:

35% DESIRE TO REDUCE TAXES
33% CREATE A LASTING MEMORIAL FOR SELF OR LOVED ONE
12% ENCOURAGEMENT OF LEGAL OR FINANCIAL ADVISORS

Desire to support the charity
The ultimate use of the gift by the charity
Desire to reduce taxes
Long-range estate and financial planning issues
Create a lasting memorial for self or loved one
Relationship with a representative of the charity
Encouragement of family and friends
Encouragement of legal or financial advisors

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43% of individuals setting up gifts to charity in their wills were found to be under 55.

Source: NCPG Planned Giving in the United States, National Committee on Planned Giving, Indianapolis, Indiana.
57% WERE OVER 55

Source: NCPG Planned Giving in the United States, National Committee on Planned Giving, Indianapolis, Indiana.

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THE AVERAGE AGE WHEN MOST DONORS MADE A WILL WAS FOUND TO BE 44, WHILE THE AGE AT FIRST BEQUEST WAS 49.

\[
\begin{align*}
44 &= \text{FIRST WILL} \\
49 &= \text{FIRST BEQUEST}
\end{align*}
\]
While only 31% were found never to have revised their wills, nearly 75% were found never to have revised their charitable bequests.
AMONG THOSE THAT HAD REVISED THEIR WILLS, MOST INCREASED THE AMOUNT OF THE BEQUEST
FEWER THAN 10% WERE FOUND TO HAVE DECREASED THE AMOUNT, AND THIS WAS MOST COMMON IN THE LOWEST INCOME GROUP ($35,000 OR LESS)
THE MOST COMMON REASON FOR CHANGING THE AMOUNT OF THE BEQUEST WAS A CHANGE IN ASSETS
ONLY 1% OF AMERICANS HAVE A CHARITABLE REMAINDER TRUST, WHILE 5% ARE WILLING TO CONSIDER ONE
Bequest donors are found among all income categories. 

<table>
<thead>
<tr>
<th>Income Range</th>
<th>% of Bequest Donors</th>
<th>Median Income</th>
<th>Mean Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under $20,000</td>
<td>25%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$20,000-34,999</td>
<td>20%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$35,000-49,999</td>
<td>15%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$50,000-74,999</td>
<td>10%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$75,000-99,999</td>
<td>5%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$100,000-124,999</td>
<td>0%</td>
<td></td>
<td></td>
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<tr>
<td>$125,000-149,999</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>$150,000-174,999</td>
<td></td>
<td></td>
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<tr>
<td>$175,000 and over</td>
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Bequest Donors **Median** Income $60,400
Bequest Donors **Mean** Income $75,900
ON AVERAGE, **80-90%** OF PLANNED GIFTS COME IN THE FORM OF SIMPLE BEQUESTS

80-90%
Donors who received a letter directly asking them for a bequest were **17 times more likely to give a bequest than donors who were not asked**.

Donors who were asked and thanked **gave twice as much as those who were not thanked**.

Those who were cultivated (notes, letters, visits, etc.) after the thank-you **gave 3 to 4 times as much**.

**Fewer than 1 donor in 14 had informed the charity that they had named them as a beneficiary in their will.**
70% of donors who made planned gifts did so because they were asked.

Ask, and ye shall receive. Ye have not, because ye ask not.
We’re a donor-centric strategic marketing firm with digital innovation at our core. We understand that 80% of an organization’s revenue comes from less than 20% of its donors or clients, so we fish where the big fish are. Our unique, trail-blazing technologies and marketing services help you raise more money from the crucial 20%, efficiently—delivering unparalleled results. Get more major gifts for today and more planned gifts for tomorrow.

**strategies + creative + technology = results**

**legacy giftmaker**
Generate more leads, cultivate more donors and find more legacy gifts. Individual tracking reports show who is interested in your organization and why, so you can engage and build effective relationships with potential donors.

**legacy giftmaker+**
Take the guesswork out of marketing by using proven technology to rank, score, and automatically nurture leads with relevant, timely, personalized messages. You’ll maximize your gift disclosures by spending your time with the most qualified and interested donor prospects, and letting Legacy Giftmaker+ take care of the rest.

**major giftmaker**
Find passionate donors in real time, and close more major gifts – faster. Major Giftmaker gives you a 360° view of individual donors’ interests, demographics, and preferences.

**giftmaker connect**
Donors want to give where they live. With Giftmaker Connect, you can tap into the power of smarter fundraising by connecting the disconnected and empowering your chapters or affiliates.

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