

Next Generation Philanthropy



Landscape for Planned Giving

- Largest Intergenerational Transfer of Wealth in the History of the World... \$41 Trillion
- Baby Boomer Business Sales...\$4.6 Trillion
- Average American has
9% Cash and 91% Assets







THE PHILANTHROPY TRIFECTA

You provide the list, we'll do the rest.



- 1 SCREEN YOUR LIST**
- Wealth screening
 - Predictable modeling

- 2 SURVEY YOUR LIST**
- Generate leads
 - Discover why they care

- 3 CULTIVATE LEADS**
- Monitor & score engagement
 - Prioritize leads over time

- 4 GROW PERSONAL RELATIONSHIPS**
- Arrange meetings with donors
 - Conduct philanthropic needs assessment

- 5 CLOSE MAJOR & LEGACY GIFTS**
- Implement gift plan

- 6 BUILD YOUR ENDOWMENT**
- Set up both a cash reserve and an fund
 - Develop investment strategies for growth

Target Analytics®

Predictive analytics, wealth screening for list segmentation

marketUsmart

Engagement fundraising software and services including lead generation, cultivation (drip marketing), and tracking

TheGivingCrowd

Help charities engage more deeply with their donors by providing tax-wise guidance on current and future gifts of assets

YOUR NONPROFIT

Donation acceptance and donor stewardship

Create awareness

Lead generation

Generate interest

Cultivation

Build desire

Closure

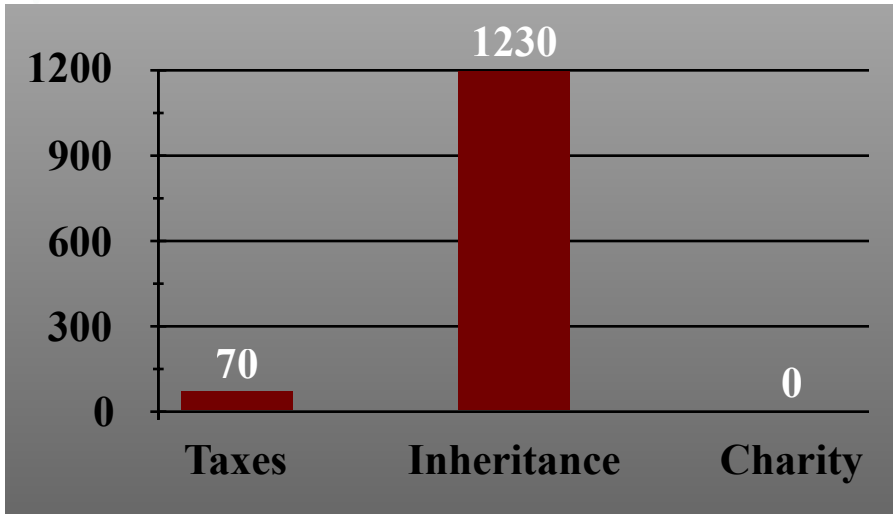
Facilitate action

STEWARDSHIP



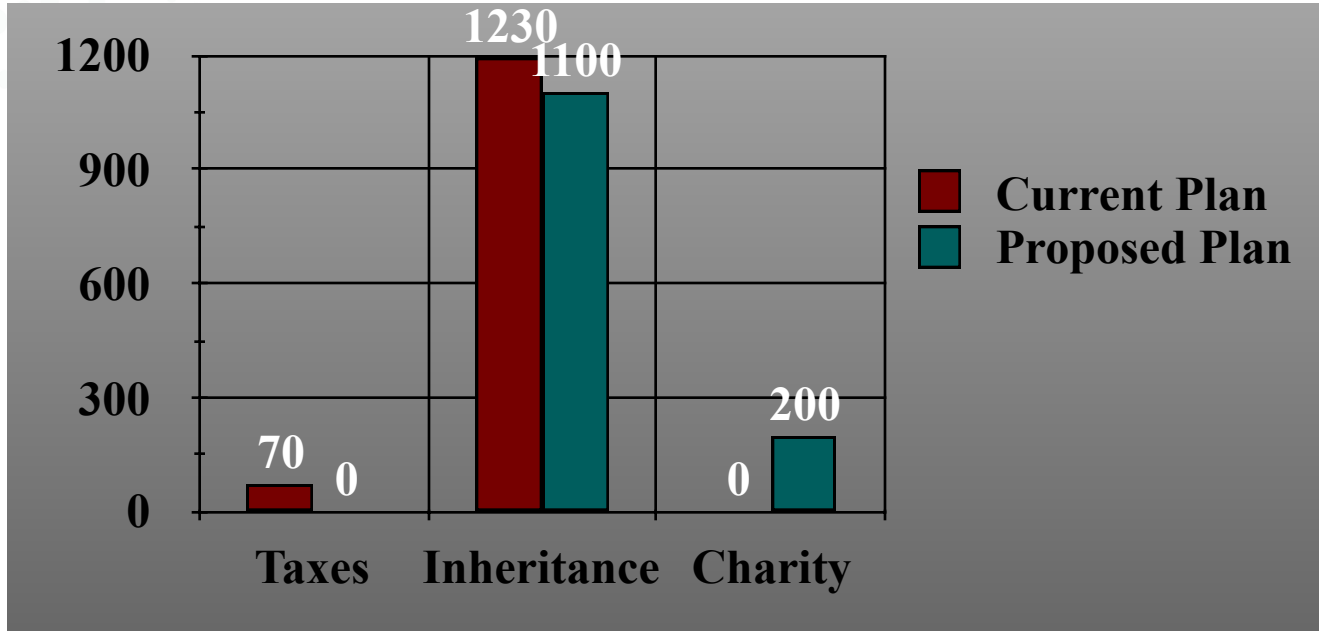
The Adams

In Thousands



The Adams

In Thousands

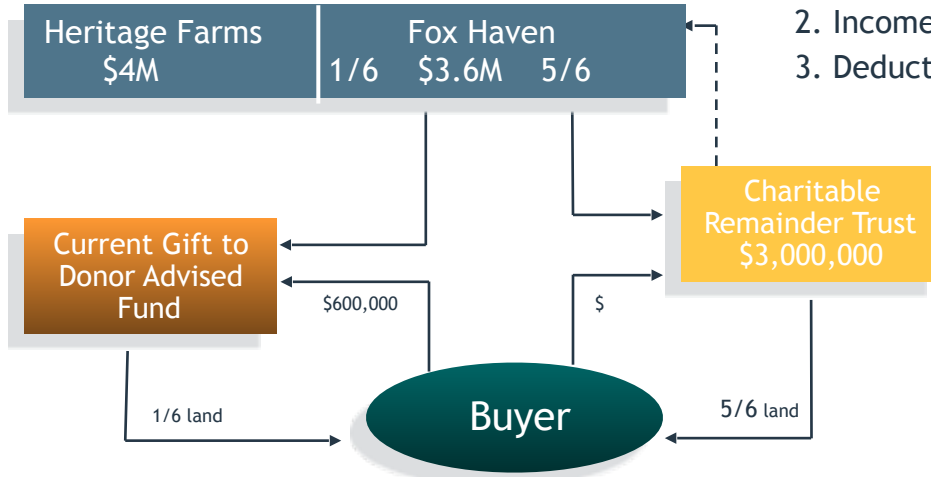


21st Century Planned Giving

“Serve the Masses: Surface the Few”sm

Charitable Sale Strategy

Jack and Betty Bowen



BENEFITS

1. No LTCG Tax
2. Income \$150,000/yr
3. Deduction \$1,451,000

Other donors ...

Widow re \$70,000 Gift Annuity

Retired couple with \$750,000 IRA

3 Business owners selling \$47M, \$65M & \$9M companies

“Serve the Masses: Surface theFew”sm

Let's Get 'er done!!



Today Is The Day

My Legacy Planner will not only allow you to assess your current will but also provide you with a thoughtful framework as you prepare to meet with your attorney or financial advisor.

Create Your FREE Tax & Legacy Assessment >

** It takes less than 10 minutes to complete.*



OTHER GIVING OPTIONS TO CONSIDER

Gifts Of Assets

Other gifts of assets, such as stocks, real estate, CDs, etc can be beneficial to you and your charity.

Charitable Gift Annuities

A charitable gift annuity (CGA) is a simple arrangement which provides financial benefits to individuals (donors) and charitable organizations.

Need Help With a Will?

Most people will discover unexpected tax liabilities that can easily be reduced or even eliminated in favor of the charities of their choice.



Our Mission

Our goal is simple; to help our clients be more successful in resourcing their vision.

[read more](#)



About The My Legacy Planner

Learn more about our unique tool and how it can help you with tax savings and charitable contributions

[Watch Our Video](#)



www.givingcrowd.co

972.850.9503



THE BEST TIME TO
PLANT A TREE IS
25 YEARS AGO

THE SECOND BEST TIME
IS **TODAY**

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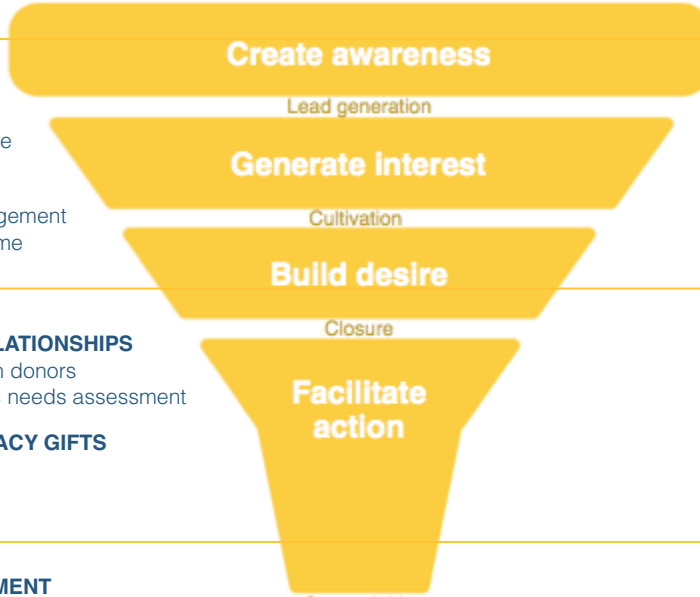
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