



UNCOVER YOUR OPPORTUNITY

Dana J. Holt, JD RICP AEP® CAP®



**WEALTH
NOT CASH FLOW**

THIS IS YOUR POTENTIAL

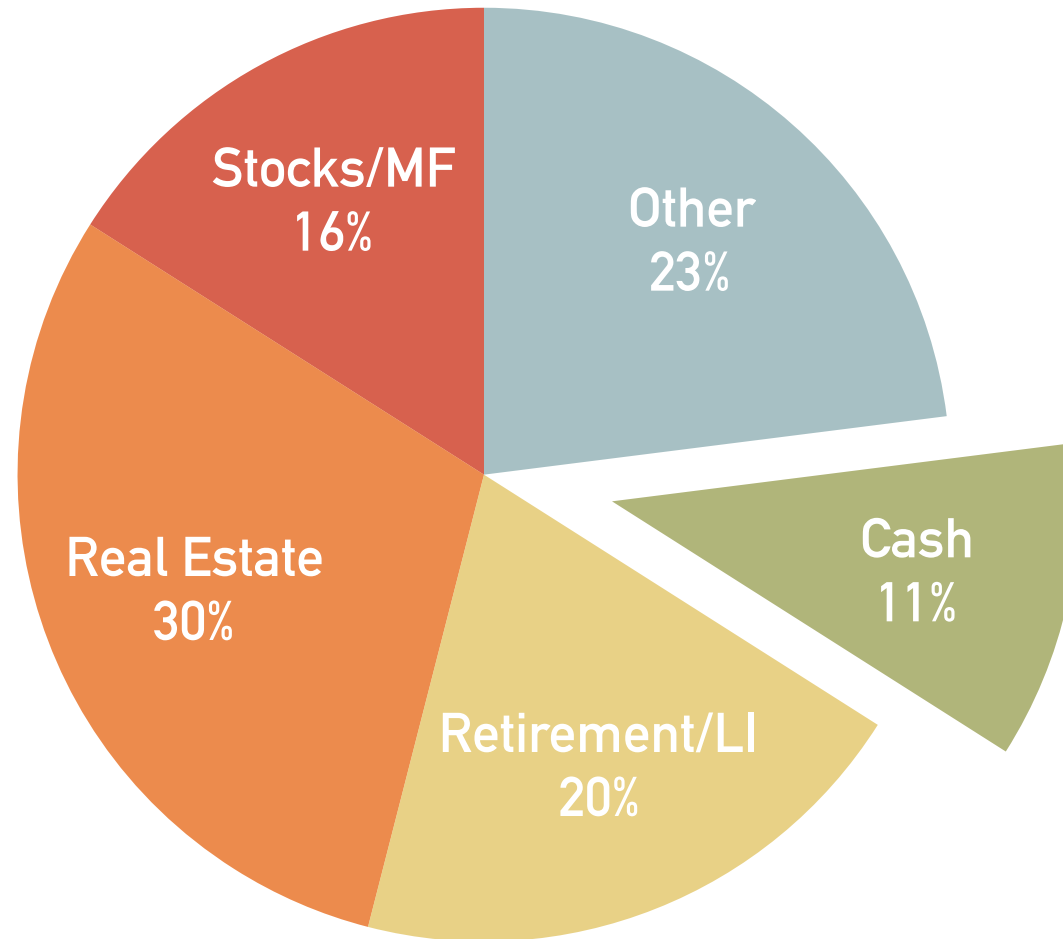
**MOST WEALTH IN
ASSETS**

**MOST GIFTS IN
CASH**

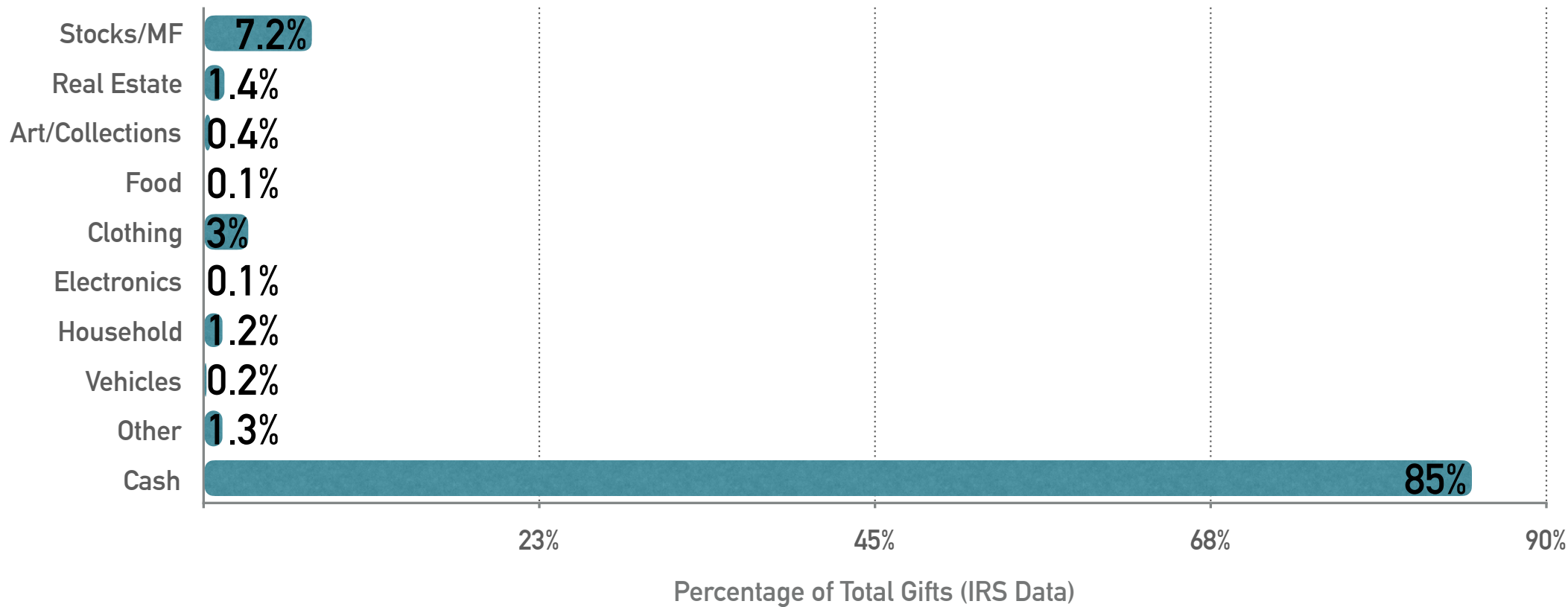
why?



ASSETS IN AMERICA: **FEDERAL RESERVE DATA 2008**



GIFTS BY ASSET TYPE IN 2012: \$305 BILLION





ILLIQUID ASSETS

- 500% larger than stock market
- stock market = \$32 trillion
- private land = \$53 trillion

“WHY CASH IS NOT KING IN FUNDRAISING” BY RUSSELL JAMES, PHD (JULY 2018)

YEARS	CASH ONLY	ANY NONCASH	ANY SECURITIES
2010-2013	5%	34%	44%
2011-2014	1%	30%	42%
2012-2015	2%	30%	39%
2013-2016	0%	25%	33%

UNDERSTAND YOUR DONORS



RETIREEES

- No more paychecks
- Gifts from cash flow
 - painful
 - tax-inefficient





RETIREEES

- Own many businesses.
- \$10 Trillion in Businesses to transfer by 2025.
- *LARGE OPPORTUNITY*

**THE
SECRET IS
GOOD PLANNING**



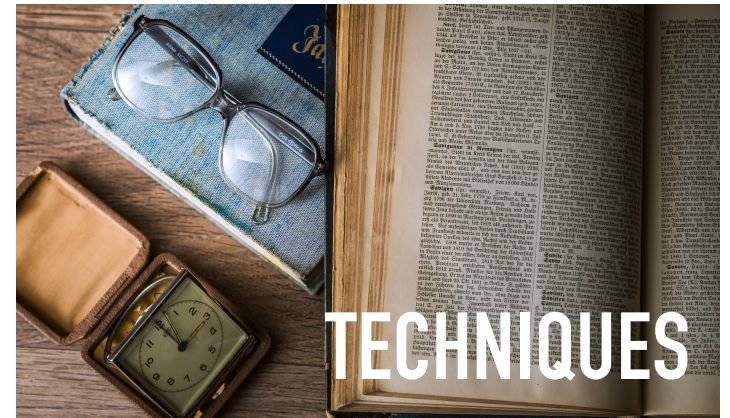
GOALS



TOOLS



TECHNIQUES



THREE ESSENTIAL STEPS TO EVERY PLAN



THREE STEPS TO EVERY PLAN

1. GOALS
2. TOOLS
3. TECHNIQUES

IN. THAT. ORDER



GOALS

1. GIVE MEANING TO WEALTH

2. VALUES & VALUABLES

3. BE REMEMBERED



CONVERSATION SPARKS

- *What is your earliest memory of giving?*
- *Is there someone you admire who shaped who you are?*
- *Who is the most generous person you know and why?*
- *How did/do your parents/grandparents practice generosity?
Does that influence your giving?*

A glowing, textured sphere, possibly a light fixture or a decorative object, is mounted on a dark, weathered wooden door. The sphere has a complex, porous, or crystalline texture and emits a warm, golden light. The door is made of vertical wooden planks and has a dark, possibly metal, handle visible to the left of the sphere. The lighting is dramatic, with the sphere being the primary light source, casting a glow on the surrounding wood and creating deep shadows.

LISTEN TO THE STORY

BE PREPARED FOR EMOTION

TOOLS





TOOLS

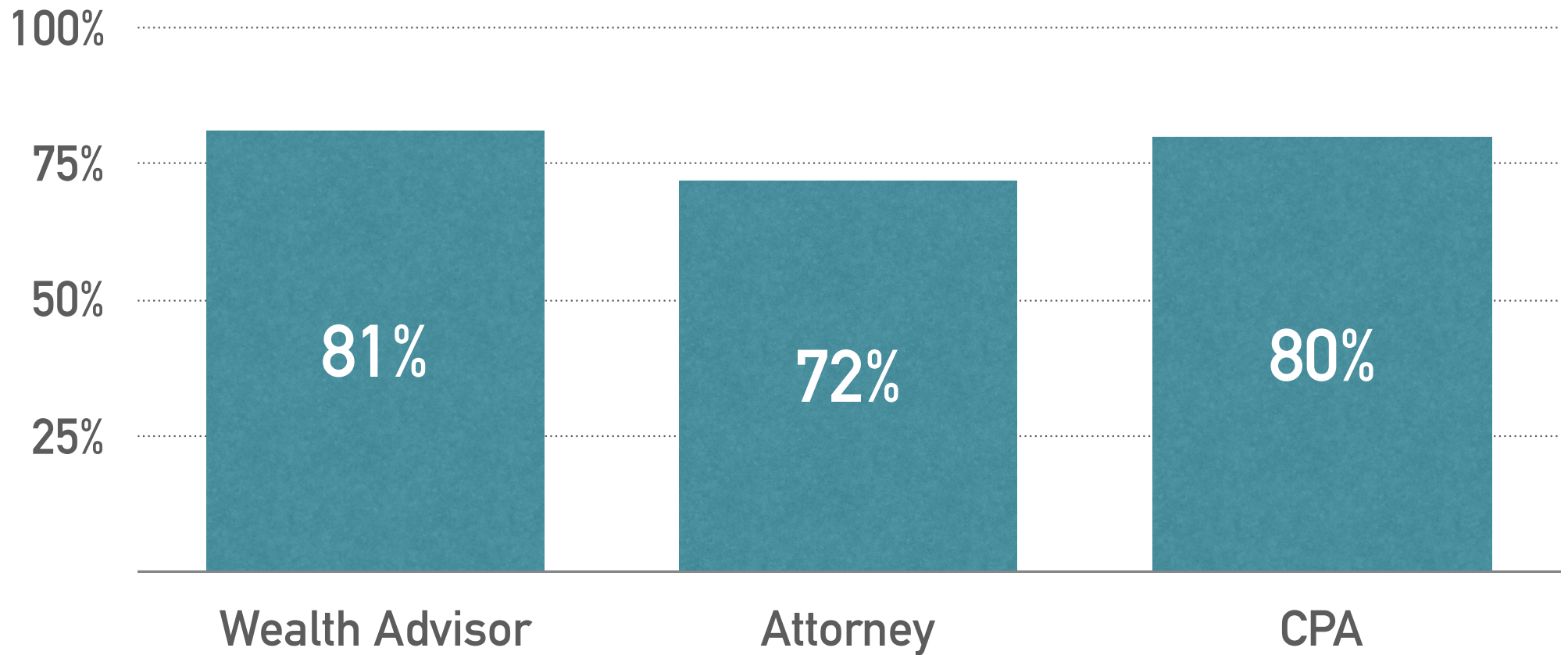
- Stocks & Mutual Funds
- Real Estate
- Life Insurance
- Business Assets
- Farms
 - Land, Machinery, Crops, Livestock
- Royalties
- Retirement Accounts
- Collections

CHOOSE THE RIGHT TOOL

- Life Events
- Taxation
- Method of Transfer
- CPA
- Financial Planner
- Attorney
- Philanthropic Advisor



US TRUST STUDY OF PHILANTHROPY 2018 – GOOD FOR BUSINESS?



**TECHNIQUE
= HOW**





TECHNIQUES

- During Life/After Death
- Direct
- Donor Advised Fund
- Charitable Remainder Trust
- Charitable Lead Trust
- Will/Living Trust
- Part Gift/Part Sale

WHERE DO YOU WANT TO GO?

focus on your goals





YOUR JOURNEY

- Commit to Growth
 - Get Others On Board
- Document Goals
- Identify Needs/Gaps
- Seek Opportunities
- Adjust Goals

COMMIT TO GROWTH

- Growth Requires Commitment
 - You
 - Board
 - Management





CHALLENGING CONVERSATION

- "Takes Too Long"
 - patience
- "We're Not Capable"
 - fear
- "Too Complex"
 - ignorance

COMPLEXITY TAKES TIME

- 95% Assets = Non-cash
- One Bite At a Time





LIMITING BELIEF

- Can Only Pick One
 - Planned
 - Major
 - Annual

COHESIVE FUNDRAISING

- Planned - Estate
- Major - Savings/Assets
- Annual - Cash Flow



DOCUMENT GOALS





1, 5, 10 YEARS

- Necessary Gifts
- Flexible Goals
- Road Map
 - goals
 - tools
 - techniques

IDENTIFY NEEDS





AREAS OF NEED

- Financial
- Gift Acceptance
- Staff
- Technology
- Communications

FINANCIAL

- Travel
- Meetings
- Events
- Materials
- Tech
- Vendors



GIFT ACCEPTANCE POLICIES

- Gift Acceptance
 - Do You Have?
 - Need Updating?
 - Who Manages?
- Resources
 - NACGP





STAFF

- Gift Officer
- Gift Administrator
- Gift Receipts
- Stewardship

TECHNOLOGY

- Tracking
- Recognition
- Illustrations
 - PGCalc
 - Crescendo
- Website





COMMUNICATIONS

- Donors
- Prospects
- Advisors
- Board
- Public
- Volunteers

COMMUNICATION OPPORTUNITY

- Encourage Asset Giving
- Encourage Income Gifts
- Encourage QCD



SEEK OPPORTUNITIES

everywhere





SEEK OPPORTUNITIES

- Conversations
- Share successes
 - team
 - board
- Volunteers
- Board
- Connections

ADJUST GOALS

as needed





ADJUST GOALS

- Check in Often
- Adjust as Needed
 - up
 - down
 - sideways
- Compensation

WRAPPING-UP

A pug dog is the central focus, sitting in a forest. It is wrapped in a light-colored blanket with a plaid pattern in shades of pink, green, and grey. The dog's head is visible, looking directly at the camera. The background is a soft-focus forest with green foliage and brown leaves on the ground.

COMMIT TO GROWTH

GET OTHERS ON BOARD

DOCUMENT GOALS

IDENTIFY NEEDS/GAPS

SEEK OPPORTUNITIES

ADJUST GOALS



WANT MORE?

1. "GIFT TIPS"

2. FREE STRATEGY SESSION



THANK YOU!

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