



LEARNING OUTCOME

After participating...

...you will be able to use will kits in order to start more planned giving conversations.

AGENDA

- Success at Texas A&M
- Components of the will kit
- How do we market the will kit?
- Processing requests
- How to demonstrate ROI at your school
- Scaling considerations: How to implement at any budget level



POLL

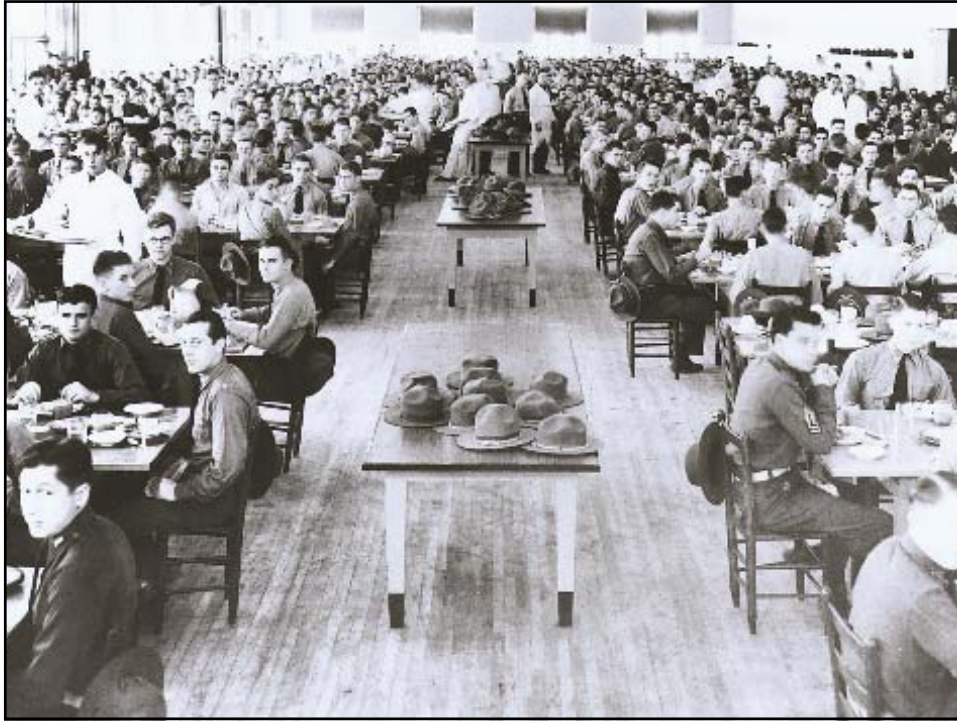
Our planned giving program currently has a wills guide/wills kit.



#Altraining

SUCCESS AT TEXAS A&M





■ EDUCATING
YOUNG
DONORS



ai ACADEMIC
IMPRESSIONS 8

2010-2015 REQUESTS

- RESULTS
 - \$20,125,070.84 intentions booked
 - 4,617 requests



QUESTIONS

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COMPONENTS OF THE WILL KIT



■ ESTATE & GIFT PLANNING KIT

- Estate & Gift Planning Workbook
- Methods of Giving
- Heritage Membership Brochure
- Together We Will Brochure
- Glossary
- Bequest Language





POLL

Where are your marketing materials coming from?



RESOURCE

4 samples

1. Foundation Wills Guide
2. Methods of Giving
3. Together We Will
4. Heritage Member Brochure

OTHER COMPONENTS

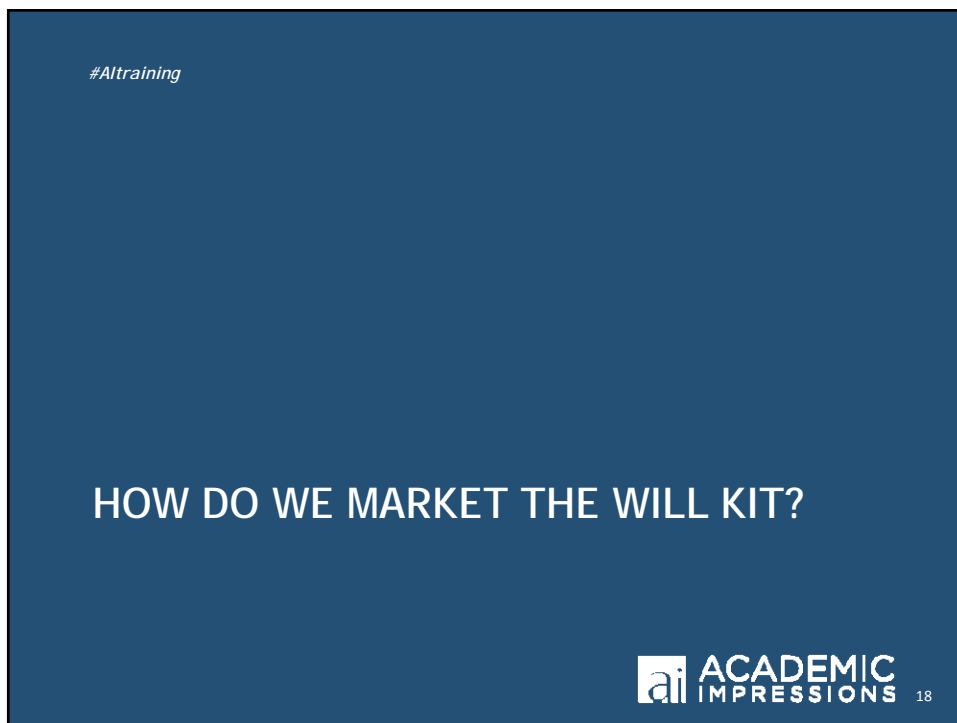


- Bequest Language
- Estate Planning Glossary
- Office of Gift Planning Intro
- Business Card

GIVEAWAYS!



- Pens
- Bookmarks
- Notepads



MARKETING CHANNELS

DIRECT MAIL

Postcards,
Advertisements,
Receipt Stuffers

EMAIL

E-newsletter,
E-blasts

EVENTS

Gift Planning Events,
Donor Education
Events

DEVELOPMENT

Development visits,
Development/Advisory
Council meetings



DIRECT MAIL



- Postcards
- Advertisements
- Receipt Stuffers



Marketing Estate Planning Tools to Uncover Planned Giving Prospects



Who will help me...
become a leader...
make the breakthrough...
change the world?

YOU CAN...

Through including a charitable gift in your will, also known as a bequest, you can support the future of Texas A&M after your lifetime. Learn more about the benefits of leaving a bequest by visiting:
txamfoundation.com/plan

OFFICE OF GIFT PLANNING
(979) 845-8101
txamfoundation.com/plan
giftplanning@txamfoundation.com

The image features a young woman sitting on the grass under a large tree, reading a book. The text is overlaid on the left side of the image. Below the main text, there is contact information for the Office of Gift Planning at Texas A&M Foundation, including a phone number, website, and email address. The Texas A&M Foundation logo is located at the bottom right.

Marketing Estate Planning Tools to Uncover Planned Giving Prospects

SPIRIT AND MIND®

TEXAS A&M FOUNDATION

OFFICE OF GIFT PLANNING
401 GEORGE BUSH DRIVE
COLLEGE STATION
TEXAS 77840-2811
tamufoundation.com/plan

Create Your Aggie Legacy.

Yes, please contact me.

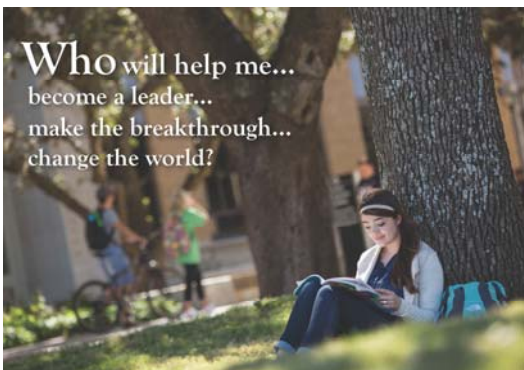
- ☐ Please send me a FREE Estate and Gift Planning Kit.
- ☐ I would like to learn more about planned giving opportunities.
- ☐ I have already included the Texas A&M Foundation in my estate plans.

Name: _____

Phone number: () _____

Email: _____

Who will help me...
become a leader...
make the breakthrough...
change the world?



NO POSTAGE
NECESSARY
IF MAILED
IN THE U.S.



From small things...



...grow big things!

SPIRIT AND MIND®

TEXAS A&M FOUNDATION

A Gift from the
Office of Gift Planning
Texas Maroon Bluebonnet



FROM SMALL THINGS GROW BIG THINGS.
Visit giving.tamu.edu/plan for information on how you can grow big things at Texas A&M through your estate plans.
Texas A&M Foundation - Office of Gift Planning
giftplanning@tamu.edu | (800) 392-3310

Just as a few "Maroon Bonnet" seeds can bloom into a field of blossoms, an estate gift can make Texas A&M even greater, and bring potential financial and tax benefits to you for years to come.

Find out how by contacting the Office of Gift Planning for a free Estate and Gift Planning Kit. With each kit, we'll also send you a packet of Maroon Bonnets so that you can start planning and planting together.

Texas A&M Foundation - Office of Gift Planning
giftplanning@tamu.edu | (800) 392-3310

To request your kit and seeds online go to
giving.tamu.edu/plan

TEXAS A&M FOUNDATION

SPIRIT AND MIND®

RECEIPT STUFFERS



The seeds of the future are in your hands.



ai ACADEMIC
IMPRESSIONS 25

From small things...



...grow big things!



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Contact the Office of Gift Planning for a free Estate and Gift Planning Kit and packet of Maroon Bonnet seeds: (800) 392-3310 or giftplanning@tamu.edu

Visit giving.tamu.edu/plan for more information.



SPIRIT AND MIND®

EMAIL



- E-newsletter
- E-blasts
- Targeted E-blasts



POLL

Do you have a reoccurring
email communication
piece?

Marketing Estate Planning Tools to Uncover Planned Giving Prospects

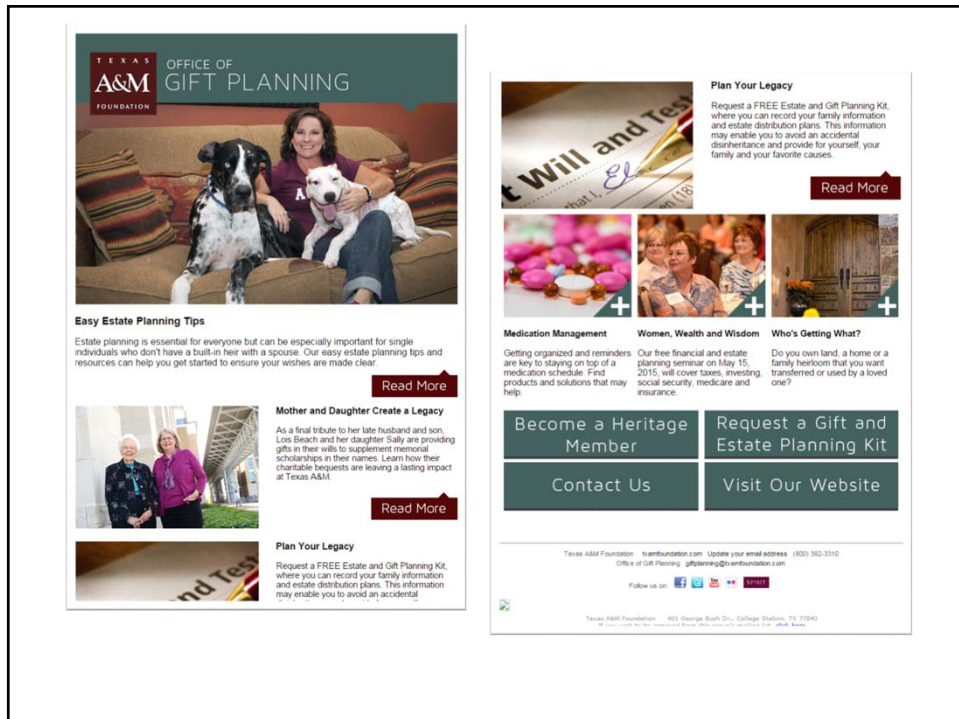


TEXAS A&M FOUNDATION OFFICE OF GIFT PLANNING

Will your loved ones be cared for?

Will your property go to those you intend?

Will your estate avoid unnecessary taxes?



TEXAS A&M FOUNDATION OFFICE OF GIFT PLANNING

Easy Estate Planning Tips
Estate planning is essential for everyone but can be especially important for single individuals who don't have a built-in heir with a spouse. Our easy estate planning tips and resources can help you get started to ensure your wishes are made clear.
[Read More](#)

Mother and Daughter Create a Legacy
As a final tribute to her late husband and son, Lois Beach and her daughter Sally are providing gifts in their wills to supplement memorial scholarships in their names. Learn how their charitable bequests are leaving a lasting impact at Texas A&M.
[Read More](#)

Plan Your Legacy
Request a FREE Estate and Gift Planning Kit, where you can record your family information and estate distribution plans. This information may enable you to avoid an accidental disinheritance and provide for yourself, your family and your favorite causes.
[Read More](#)

Medication Management
Getting organized and reminders are key to staying on top of a medication schedule. Find products and solutions that may help.

Women, Wealth and Wisdom
Our free financial and estate planning seminar on May 15, 2015, will cover taxes, investing, social security, Medicare and insurance.

Who's Getting What?
Do you own land, a home or a family heirloom that you want transferred or used by a loved one?

[Become a Heritage Member](#) [Request a Gift and Estate Planning Kit](#)

[Contact Us](#) [Visit Our Website](#)

Texas A&M Foundation | [tamufoundation.com](#) | Update your email address | (800) 362-3310
Office of Gift Planning | [gplanet@tamufoundation.com](#)
Follow us on: [Facebook](#) [Twitter](#) [LinkedIn](#) [YouTube](#) [Instagram](#)

Texas A&M Foundation | 401 George Bush Dr., College Station, TX 77740
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TARGETED EMAIL



TEXAS A&M FOUNDATION
SPIRIT AND MIND

Have you planned for tomorrow?

- Preserve your assets for those you care about most.
- Prepare a trusted person to care for you should you need future assistance.
- Ensure financial stability during retirement.
- Take full advantage of available tax benefits.
- Create a lasting legacy.

An estate and gift plan can help you reach your goals. The most complicated part of preparing your plan is taking the first step: deciding to do it.


We are excited to debut our FREE Estate and Gift Planning Kit.

This new and improved kit includes our **Provide & Protect** book and **Planning for Your Future** workbook.



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TARGETED EMAIL



TEXAS A&M FOUNDATION
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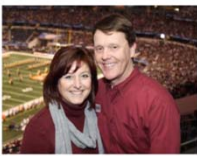
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[Request your FREE planning kit today.](#)



TARGETED EMAIL



TEXAS A&M FOUNDATION
SPIRIT AND MIND


Have you planned for tomorrow?

- Ensure your children will be cared for if something happens to you.
- Preserve assets to pass on to your kids.
- Take full advantage of available tax benefits.
- Create a lasting legacy.


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[Request your FREE planning kit today.](#)



TARGETED EMAIL



TEXAS A&M FOUNDATION
SPIRIT AND MIND


Have you planned for tomorrow?

- Preserve assets to pass on to your kids and grandkids.
- Ensure financial stability during your upcoming retirement.
- Take full advantage of available tax benefits.
- Create a lasting legacy.


An estate and gift plan can help you reach your goals. The most complicated part of preparing your plan is taking the first step: deciding to do it.

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[Request your FREE planning kit today.](#)




Marketing Estate Planning Tools to Uncover Planned Giving Prospects



 **CHAT**

Can you think of other
ways you might offer your
kit?

 **ACADEMIC**
IMPRESSIONS 37

 **QUESTIONS**

 **ACADEMIC**
IMPRESSIONS 38

#Altraining

PROCESSING REQUESTS



ESTATE & GIFT PLANNING KIT REQUEST FORM

[Requesting your kit](#)



RESPONSE EMAIL

Dear Angela Throne,

Thank you for requesting our Estate and Gift Planning Kit. If you have requested a hard copy, one will be mailed to you shortly.

[Your online kit can be found here.](#)

Also available from the Office of Gift Planning is the book Provide and Protect. This book contains information you may need to make decisions to plan and provide for yourself and your family into the future. If you would like a hard copy of this book, please email me your request and include your mailing address.

The Office of Gift Planning at the Texas A&M Foundation is here to assist you and your professional advisers if you desire to benefit Texas A&M University after you have provided for your family and loved ones. Please do not hesitate to contact me if I can be of any assistance to you or if I can provide further information for you.

Thanks,
Angela Throne '03
Planned Giving Officer

Texas A&M Foundation | Spirit and Mind

Toll-Free: (800) 392-3310
Office: (979) 845-8161



ESTATE AND GIFT PLANNING KIT

[Thank you!](#)



TAGGING REQUESTS



- Every request gets a contact report.
- Every contact report is tagged as a wills kit request and receives an initiated by code.





TAKEAWAYS

Tag all responses from marketing. This allows you a way to easily track your success.



QUESTIONS

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HOW TO DEMONSTRATE ROI AT YOUR SCHOOL



■ SHOW YOUR SUCCESS

Don't bury your success. Show it off!





RESOURCE

Planned Giving Review Infographic



ROUTINELY CHECK IN



- Pull your list of requests and track:
 - Giving
 - Annual
 - Major
 - Planned
 - Contacts
 - Visits
 - Information Requests

PASS ON PROSPECTS



- Twice a year pull a list of kit requests and send to major gift officers.

SUCCESS STORY



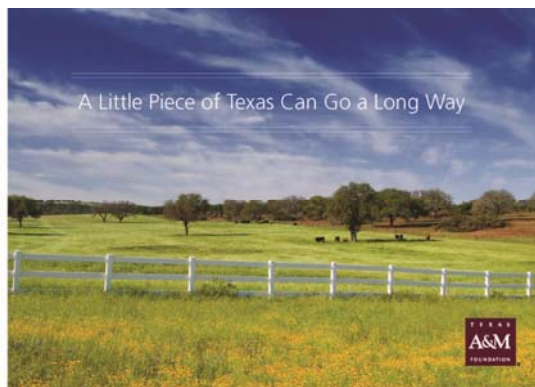
- Requested the kit in 2010
- Added to all PG mailing lists
- In 2013, used reply card to let us know that they had included us in their estate plans.
- Met and documented 7-figure gift that will create scholarships.

■ RETHINK YOUR MEANING OF SUCCESS STORY

- Received a check as beneficiary of a retirement account.
- The Aggie who had passed away had requested a wills kit just two months prior to his passing.

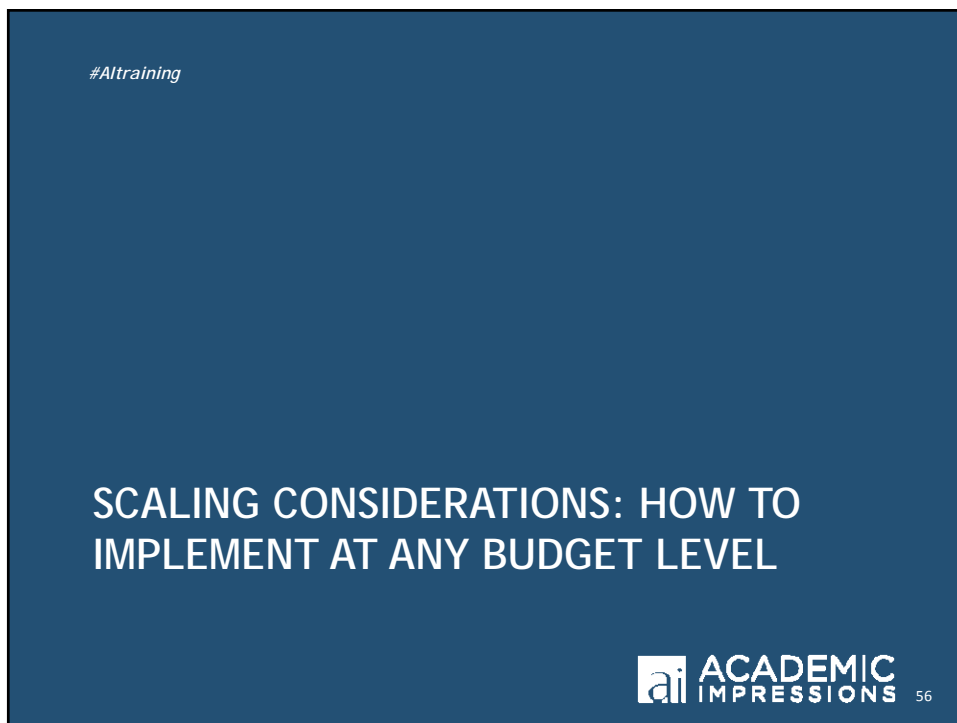


■ WORKING SUCCESS STORY



- Alumnus attended an event in 2011 and received a kit.
- In December 2015, contacted us to begin the process of setting up a Real Estate funded charitable trust.

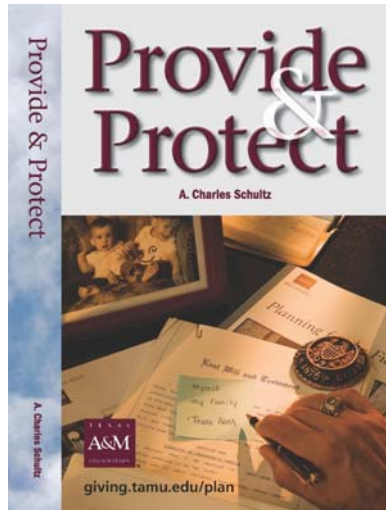




Marketing Estate Planning Tools to Uncover Planned Giving Prospects



LIVE AND LEARN!



- Provide & Protect Book is by request only.
- Created electronic version.



TAKEAWAYS

Electronic Wills Guide

An electronic version will save you money and still generate prospects.

[Texas A&M Estate Planning Kit](#)

SMALL BUDGET?



- Offer just the guide.
- Only offer once or twice a year.
- Use what you have.

QUESTIONS



EVALUATION

Thank you!

Please remember to complete the event evaluation.
Your comments will help us continually improve the
quality of our programs.

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