



# Create a Legacy Giving Program at Any Stage

LEVERAGE PHILANTHROPIC GIVING FOR THE FUTURE

# Panelists

- ▶ **Aimee Granger**, Legacy Giving Director, PBS Wisconsin
- ▶ **Brea Pautsch**, Legacy Giving Manager, PBS Wisconsin

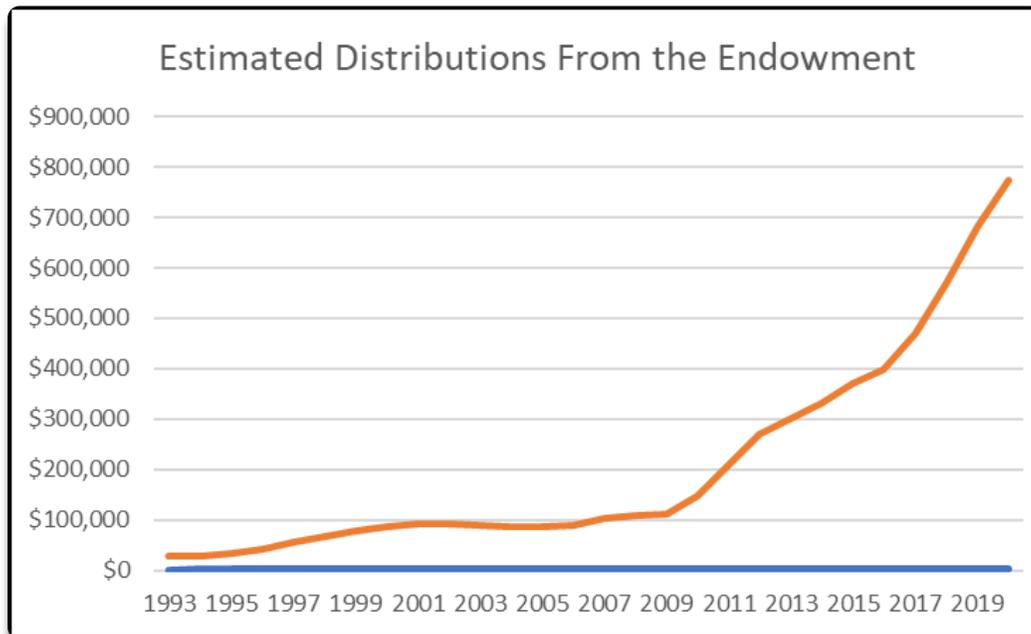
Planned  
Giving =  
Bequests?

YES,  
AND...



# The Great Wealth Transfer is Happening Now

# Why planned giving?



- ▶ According to the NYT: \$84 trillion will be passed down through 2045; \$16 trillion within the next decade.
- ▶ Charitable bequests are 2.74 times larger than donors' *lifetime* charitable giving
- ▶ Donors who make gifts in their estate plans tend to make larger annual gifts after they make their plans
- ▶ A Planned-Giving program is a smart investment – by designating planned gifts to your endowment fund, you can create sustained income

# Profile of Legacy Donors



Average years of giving



Average Annual Gift



Average Estate Gifts

# Donor Profile – Annual vs Planned Giving

Average total lifetime giving from top 5 legacy donors to PBS Wisconsin in the last 3 years:

**\$2,370**

Average planned gift from same donors:

**\$617,642**

# Amplify Planned Giving at Your Organization



Getting Started



Intermediate



Accomplished

# Level 1 Resources

- ▶ Annual Member Survey
- ▶ Buck slip – self identifier tools
- ▶ Create a pipeline of planned giving prospects
- ▶ Develop a gift acceptance policy
- ▶ Sample bequest language
- ▶ Planned Giving information on website

# PBS Wisconsin 2022 Member Survey

Please mark your responses and return the survey with your tax-deductible contribution by Oct. 31.

Thank you!

1. Please tell us how often you or members of your family  
0 = Never watch 1 = Rarely watch 2 = Sometimes watch

## NEWS & PUBLIC AFFAIRS

FRONTLINE	0	1	2	3
Here & Now	0	1	2	3
PBS NewsHour	0	1	2	3
Washington Week	0	1	2	3
News & public affairs programs in general	0	1	2	3

## HISTORY & CULTURE

American Experience	0	1	2	3
Riding Your Roots	0	1	2	3
The Great American Recipe	0	1	2	3
History & culture programs in general	0	1	2	3

## SCIENCE & NATURE

Nature	0	1	2	3
NOVA	0	1	2	3
Science & nature programs in general	0	1	2	3

## WISCONSIN PROGRAMS

Wisconsin Life	0	1	2	3
Around the Farm To Market	0	1	2	3
Wisconsin Foodie	0	1	2	3
Wisconsin Hometown Stories	0	1	2	3
University Place	0	1	2	3
Wisconsin program in general	0	1	2	3

## INFORMATIONAL

Antiques Roadshow	0	1	2	3
Rick Steves' Europe	0	1	2	3
Sewing With Nancy	0	1	2	3
This Old House	0	1	2	3
Fitness Programs	0	1	2	3
Information & how-to programs in general	0	1	2	3

Independent Lens 0 1 2 3

Film & drama programs in general 0 1 2 3

Would you consider including PBS Wisconsin in your will or estate plans?

- Yes, I have already included PBS Wisconsin in my will.
- I would consider including PBS Wisconsin in my will. Please send information.
- No, I'm not interested at this time.

continued on back 



**AIMEE GRANGER**  
 608-265-0723  
 aimee.granger@  
 pbswisconsin.org



**BREA PAUTSCH**  
 608-263-2129  
 brea.pautsch@  
 pbswisconsin.org

**FOR MORE INFORMATION,  
 CONTACT US TODAY!**

 **PBS Wisconsin**  
**HERITAGE  
 SOCIETY**

Including Friends of PBS Wisconsin in your estate plans automatically qualifies you as a member of our Heritage Society. To join, simply name Friends of PBS Wisconsin as a recipient of your planned gift and contact us or fill out our confidential survey at [pbswisconsin.org/legacy](http://pbswisconsin.org/legacy).

 **PBS Wisconsin**  
**HERITAGE  
 SOCIETY**

- CALL ME TO DISCUSS MORE DETAILS ABOUT WILLS, BEQUESTS AND TRUSTS
- SEND ME INFORMATION ABOUT THE HERITAGE SOCIETY
- I'VE ALREADY INCLUDED PBS WISCONSIN IN MY WILL OR ESTATE PLANS

**BEQUEST LANGUAGE**

To make PBS Wisconsin a part of your legacy, please use the following legal name in your estate plans:

**Friends of PBS Wisconsin, Inc.**  
 821 University Ave.  
 Madison, WI 53706

Federal Tax ID: 23-7300462

NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_

TELEPHONE \_\_\_\_\_ EMAIL \_\_\_\_\_

**PLEASE RETURN TO:** Friends of PBS Wisconsin, 821 University Ave., Madison, WI 53706-1497



Let's talk  
about Level 1

# Level 2 Resources

- ▶ Planned Giving staff full or part-time
- ▶ Direct address messaging to constituents
- ▶ Celebrate donor stories
- ▶ Legacy society
- ▶ Letter of Intent
- ▶ Recognition opportunities

# Letter of Intent



## Planned Gift Statement of Intent

As an indication of my/our desire to provide a legacy of support to PBS Wisconsin, I/we hereby inform the Friends of PBS Wisconsin that I/we have made a provision for a gift in my/our estate plan. I/We understand that this commitment is revocable and can be modified by me/us at any time.

### DONOR INFORMATION

Full Legal Name(s)

Street Address

City

State

Zip



Let's talk  
about Level 2



# Level 3 Resources

- ▶ Planned Giving Campaigns:
  - ▶ National Estate Planning Awareness month (October)
  - ▶ Make a Will Month (August)
- ▶ Planned Giving brochure, branded materials
- ▶ Naming Opportunities
- ▶ Detailed endowment investment plan and spending plan
- ▶ Wealth screening service
- ▶ Blended gifts, CGAs, CRTs, Real Estate, Life Endowed Gifts

**PBS Wisconsin**  
**HERITAGE SOCIETY**  
A Legacy for the Future



**BRUCE AND LISA WACHHOLZ**  
HERITAGE SOCIETY MEMBERS, DODGEVILLE, WI

*"We want public broadcasting to continue. We trust PBS Wisconsin to be responsible stewards by continuing to provide in-depth reporting and unbiased information that makes you think."*



**SHBY**  
SOCIETY MEMBER, MADISON, WI

*"with creative programs like Neighborhood, and today I watch thoughtful and entertaining shows I love on PBS Wisconsin. I joined the Heritage Society to help preserve this legacy of great programming in Wisconsin."*

## Consider the many ways to contribute

### BEQUEST

Designate a gift in your will or trust with a specific amount or a percentage of your estate.

### CHARITABLE BENEFICIARY DESIGNATION

Name Friends of PBS Wisconsin as a beneficiary of your IRA, life insurance policy, bank account, or other account.

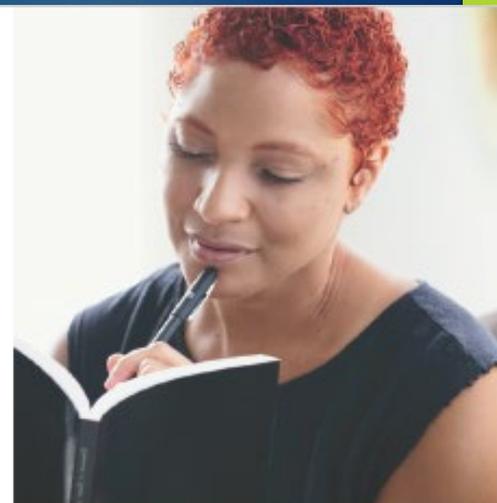
### CHARITABLE GIFT ANNUITY

Provide lifetime annual income to yourself and a gift to PBS Wisconsin at the end of your life. Annual payments are based on your age when the CGA is established, and may be deferred.

### CHARITABLE REMAINDER UNITRUST

Transfer cash or appreciated property into a charitable remainder unitrust. The trust sells your property tax-free and provides you with income for life or a term of years, after which the trust distributes the remainder to PBS Wisconsin.

*Unless otherwise specified, legacy gifts to Friends of PBS Wisconsin are invested in our endowment to ensure the future of PBS Wisconsin for generations to come.*



We appreciate every thoughtful contribution

**PBS Wisconsin**

TO BENEFIT PBS WISCONSIN WITH A CHARITABLE GIFT IN YOUR ESTATE PLAN, PLEASE DIRECT YOUR GIFT TO:

Friends of PBS Wisconsin, Inc.  
821 University Ave.  
Madison, WI 53706  
Federal Tax ID: 23-7300462

**PBS Wisconsin**  
**HERITAGE SOCIETY**

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inform the Friends of PBS Wisconsin  
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**DONOR  
INFORMATION**

Full Legal Name(s)

Street Address

City

**PBS Wisconsin**  
**HERITAGE SOCIETY**  
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**FOR MORE INFORMATION,  
CONTACT US TODAY!**

**PBS Wisconsin**  
**HERITAGE SOCIETY**

Friends of PBS Wisconsin  
Heritage Society  
821 University Ave.  
Madison, WI 53706  
pbswisconsin.org/legacy

**PBS Wisconsin**  
**HERITAGE SOCIETY**

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**HERITAGE SOCIETY**

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- SEND ME INFORMATION ABOUT THE HERITAGE SOCIETY
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NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_

TELEPHONE \_\_\_\_\_ EMAIL \_\_\_\_\_

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PBS Wisconsin

# Personal Estate Planning Guide

[pbswisconsin.org/legacy](http://pbswisconsin.org/legacy)

October is National Estate Planning Awareness Month.

Get additional information

# Yes,

I am interested in getting started today!

- Send me my **FREE** *Personal Estate Planning Guide*.
- Send me information on how to support the future of this station through a planned gift.
- I have already included this station in my will or other estate plan.

Name \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_  
State \_\_\_\_\_ Zip \_\_\_\_\_  
\_\_\_\_\_

**PBS Wisconsin Friends**

Friends of PBS Wisconsin  
821 University Ave.  
Madison, WI 53706-1497

Non-Profit Org  
U.S. POSTAGE  
PAID  
Madison, WI  
Permit 7218



# Plant the Seed

A few simple steps today will give you peace of mind tomorrow

**PBS Wisconsin**

Contact us today for a **FREE** *Personal Estate Planning Guide*



# Plant the Seed



Thinking about the future is something we all share. Estate plans help you protect the things that matter most. Put your mind at ease by planning your future today.

## MORE DONOR STORIES



**Jeanne and Joe Silverberg**

Together, Joe and Jeanne have watched and learned from PBS Wisconsin for many years.



**Adah Sorenson**

Adah had great passion for the arts and drama and loved PBS Wisconsin.



**Warren Dorn and Barb Liles**

Warren and Barb were inspired by many public television programs.



**Ellen Fluck**

Ellen's son James takes pride in knowing that his mother planted seeds.



**Lewis and Mary Peckham**

Through their generous gift, Lewis and Mary help others explore new worlds.



**Erna Heinrichs**

Erna decided to pay it forward so future generations can benefit from PBS Wisconsin.



Honor the Gifts.  
Tell the Stories.  
Inspire Others.



# Best Practices

- ▶ Excellent engagement and stewardship is essential. Be consistent and donor centric, not transactional.
- ▶ All members of the community are potential planned giving prospects and meaningful bequests come in all sizes. Honor the intent of donors.
- ▶ Long time, consistent donors of funds, time, and care for the organization are excellent prospects. Give them your time and attention.
- ▶ Make your legacy program visible. Inform your constituents of your ability to accept and fiscally manage planned gifts.
- ▶ Be patient. Planned Gifts are gifts of a lifetime.

Thank you!

QUESTIONS?