



## Building Endowment through Planned Giving

Developing a successful planned giving program can be a complex undertaking. It involves asking individuals to insure continuing support after their death to organizations that were important to them during their lifetime. Planned giving is about loyalty, not wealth. MacIntyre Associates can help you create or build an endowment successful planned program.

We work with you in the following areas:

- Defining clearly the case for an Endowment Fund
- Targeting the right prospects
- Establishing leadership gifts before general solicitation begins
- Understanding the concepts of donor cultivation and the personal appeal
- Tailoring the correct appeal to the donor
- Understanding the benefit to the donor as well as the organization
- Forming "Legacy Clubs" or other entities that highlight these special donors
- Creating a discrete Endowment Fund with rules for investments, use of funds and terms of distribution.

There may be situations specific to your need and organizational structure. Faith based programs and denominations restrictions within churches may need approaches that recognize and address them.

*Partnering for Mission*

106 West State Street, Kennett Square, PA 19348 610-925-5925  
1880 Superfine Lane, Suite 9, Wilmington, DE 19802 302-530-6806  
[www.macintyreassociates.com](http://www.macintyreassociates.com)