



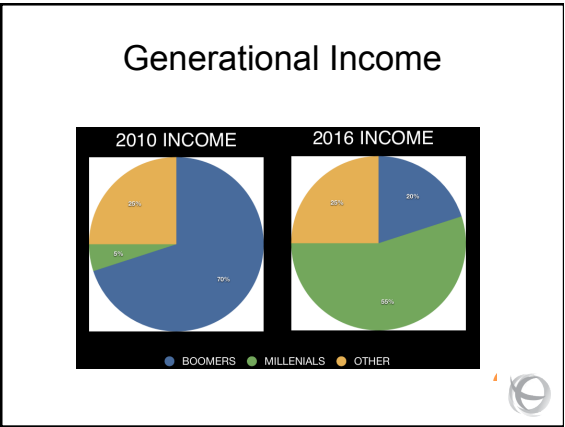
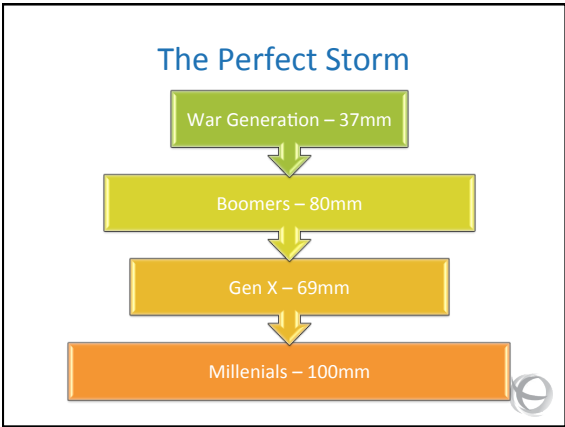
## Dynamic Major Donor Presentations

Alanna Linden  
National Christian Foundation  
August 2011




## Understanding Demographics

- War Generation (Silent)
  - Fought or grew up under WWI and WWII
- Baby Boom Generation
  - Born just after WWII – 1945-1960
- Generation X
  - Born Mid 1960s to late 1970s
- Millennial Generation (Y)
  - Born 1980 to late 1990s

## The Power of Connection

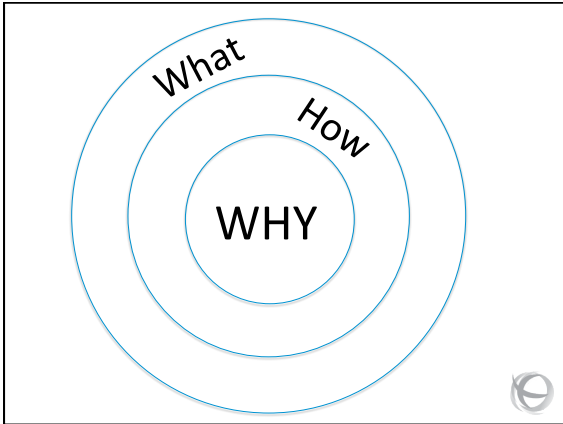
- What questions do you ask?
- How does your story connect?
- Are you connected to the Big Why?



## Why?

- Ted Talk – Simon Sinek



### The Power of Why

- It is not what you do. It is not how you do what you do.
- People buy your why.
- Why do you believe?
- Why do you do what you do?

### Research Worth Knowing

- 2010 Study of High Net Worth Philanthropy  
– Center on Philanthropy at Indiana Univ
- Money For Good  
– Hope Consulting
- Entrepreneurs and Philanthropy  
– Fidelity

### Motivations and Attitudes of Wealthy Givers

- Strong Commitment to Nonprofits
- Give when Strategic
- Expect Effectiveness & Transparency
- Attending a religious service and/or volunteering = more likely to give
- Largest gift to Operations
- Consult with Legal and Financial Professionals

\* From Indiana Univ Study

### Six Behaviors of Giving

- Repayer
- Casual Giver
- High Impact
- Faith Based
- See the Difference
- Personal Ties

\* From Hope Consulting Study

### Entrepreneurs

- Entrepreneurs give twice the % of profits than America's largest companies
- Motivated to involve Employees: Encourage employees to give and volunteer
- Nine in 10 donate money personally and corporately while 70% donate time

\* From Fidelity Study

### The What of Giving

#### The Power of ROI

- Return on investment
- Increasing competition
- The need for accountability

When you make a gift of \_\_\_\_\_, it produces \_\_\_\_\_ result.



### The Power of Sustainability

- A business plan for success
- Thinking innovation
- Entrepreneurial activity
- Gathering Entrepreneurs



### The Power of Value

#### How did I serve them?

- Their work/their business
- Their Network
- Increase their Expertise

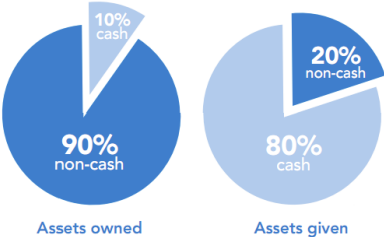


### The Power of Options

- Time
- Talent
- Treasure
  - All forms of cash
  - All forms of non cash
  - Liquidity
  - Give more. Less Tax.



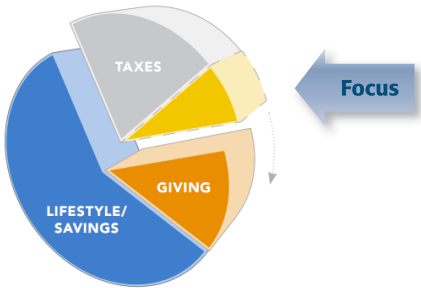
### Typical Giving



\* IRS averages data from 2000-2010



### Giving Opportunity





- ### Best Assets for Giving
- Business Interests
    - S-corporation stock
    - Partnerships and LLCs
    - Closely held C-corporations
  - Real Estate
  - Personal Property
    - royalties, collectibles, copyrights, patents
  - Estate Gifts
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- ### Case Study
- Tom and Susan bought a Beach House for \$50,000 when they married
  - 25 years later worth \$500,000
  - Not using so want to sell and give to charity
  - Issues
    - Capital Gains Tax will be \$94,500
    - Timing of Sale
    - Want to give to multiple charities
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- ### Case Study Solution
- Give to Property before the sale
  - Secure Charitable Deduction of \$500,000
  - No Capital Gains Tax
  - After sale - \$500k went to charity, not \$405,500
  - Saved extra \$38,745 in taxes b/c of higher deduction. Used to support kids college, give more or other needs.
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### Conclusion

Know Yourself,  
Know Your Givers,  
Serve Well

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### Questions?

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