

What You Can Expect From Our Gift Planner?

Sometimes a gift to ABC Charity requires a good bit of planning. The size of the gift, the type of asset, the need for retirement income, the tax consequences, the coordination of the gift plan -- these are a few of the questions and concerns a donor may face.

To help with the gift-planning process, ABC offers the services of a gift planning officer. Her name is Jane Doe and she is available to assist you. What can you expect from Ms. Doe as our gift planning officer?

1. She will honor your confidences.

Making a gift out of your estate assets may touch sensitive concerns regarding personal wealth and family expectations. She will help you set your goals and objectives and will help you coordinate with your professional advisors. She will provide helpful information about various gift vehicles and the opportunities available to you here at ABC Charity. She can also provide tailor-made illustrations showing the workings and benefits of a particular planned gift.

3. She will meet with your advisors.

Sometimes a gift plan can be confusing and difficult to explain. Ms. Doe is able to discuss the plan in detail with your advisors so they have a good grasp of what you desire to do. This can often save time and expense.

4. She will help coordinate your plan.

Ms. Doe is good at fitting all the puzzle pieces together. She will help orchestrate the gift process with a checklist of steps and will encourage the various parties (ABC Charity, your professional advisors, etc.) to meet your planning deadlines. She'll move the process along and make your gift giving more enjoyable for you.

5. She will provide ongoing contact.

Once your gift is made, Ms. Doe will maintain contact with you to ensure that you are informed about the results of your gift and to keep you in close touch with ABC. We value our planned gift donors and Ms. Doe will let you know this again and again.

While Ms. Doe can assist you in planning your gift, there are some things she will not do. She will not twist your arm to get a gift for ABC. She will not purposefully hide important information from you nor will she attempt to be your legal or financial counsel. In fact, for your protection, she will insist on obtaining professional counsel from your own professional advisors before you make any major decisions. We greatly appreciate your generous friends who carefully plan their gifts. If you would like Ms. Doe to help you in this process, please call her at 000-123-4567. You will enjoy getting to know her.

(Please complete and return this reply form.)

Dear Friends at ABC Charity:

- Please send me free literature about making a planned gift to ABC Charity.
- Please contact me to arrange for a visit.
- I have included ABC Charity in my estate plans.
- Please send me information about the ABC Heritage Society.

Name: _____

Address: _____

City: _____

Province: _____ Postal Code: _____

Phone: _____ Email: _____

[ABC Charity Mailing Address Information Here]