

Longitudinal Results of Legacy Leaders' Planned Giving Campaigns

Toronto, ON. May 26, 2010 — Two months ago, a prominent Toronto Foundation asked Legacy Leaders to run a 10 year bequest history analysis of received bequests and expectancies in order to evaluate its overall planned giving program. The goal of this analysis was to accurately forecast bequest revenue to the Foundation over the next 40 years. Over the last decade, the Foundation had conducted three large planned giving programs with Legacy Leaders.

The analysis discovered a number of interesting facts. One such fact was that the bequests resulting from the Legacy Leaders' campaigns were realized at 2 ½ times the value of unsolicited bequests. The bequest average from a Legacy Leaders donor averaged over \$72,000.

Ken Ramsay, President & CEO of Legacy Leaders had this to say about the findings:

"The process of interacting with the donor, reviewing the case for support and explaining how a bequest will make a difference, has encouraged larger gifts. I was quite pleased with this discovery. Planned giving is all we do and each program is structured to ensure the best possible results. I'm happy that our campaigns have garnered greater planned gift dollars for our clients. That is our ultimate goal and we continue to reach it, time and time again. "

The forecast depicted a future revenue flow from all planned gift expectancies (inflation adjusted) of over \$55,000,000 over the next 40 years for the Hospital Foundation. The net present value of the portfolio is a robust \$16,000,000 demonstrating the results of a substantial planned giving effort. Our analysis showed that their program is in the top echelon of programs of organizations of similar size and type.

For more information on how Legacy Leaders can benefit your organization's planned giving expectancies, visit the Legacy Leaders website at www.legacyleaders.com. Or to schedule a no obligation presentation to learn more about Legacy Leaders' customizable planned giving programs, email gchialtas@legacyleaders.com.

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