

University of Waterloo Bequest Campaign raises \$ 4.4 Million

Toronto ON., March 1, 2007 — Legacy Leaders Inc. recently completed the 2006 Bequest Campaign Performance Report to another successful University of Waterloo campaign. As a result of this campaign, the University can expect approximately \$ 3.2 to \$ 4.4 million in planned gift revenue.

In 2005, the University of Waterloo had decided to enhance their planned giving efforts and conduct a Planned Giving Pilot Study with Legacy Leaders. Subsequently, based on the success of this Study, their decision to commence a second bequest campaign with Legacy Leaders has paid dividends to their planned giving fundraising efforts. 12% of the University's donors committed a bequest gift to the University of Waterloo.

Ken Ramsay, President & CEO of Legacy Leaders commented on the campaign; "I was delighted but not surprised with the results. When individuals are closely aligned with the mission of an organization and are contacted correctly in the appropriate manner, there is always considerable support for a planned gift. Based on the results of the 2005 Campaign with the University of Waterloo, I knew that a Full Campaign would be successful."

The 2005 Legacy Leaders Pilot Study for the University of Waterloo secured an impressive 2 million dollar plus in secured planned giving bequest while contacting 1000 donors. With the implementation of a Full Legacy Leaders Campaign their expectancies more than doubled in 2006. Sharon McKay-Todd, Planned Giving Manger for the University of Waterloo had this to say about Legacy Leaders;

"We initially started with a planned giving feasibility study done by Legacy Leaders using some tried and true marketing criteria. It provided us with some valuable information unique to our organization; so I would highly recommend it as a starting point. Going through that in depth process took the guess work out of the next phase; namely, a very targeted planned giving campaign to over 2000 individuals."

The strength and effectiveness of a Legacy Leaders campaign can be credited to the professional and detailed work that goes into the preparation of each campaign before calling even begins. The information gathered before campaign commencement fuels the success of the Legacy Leaders' Phone Consultation team; Ken Ramsay refers to these consultants as "Junior Planned Giving Officers. They are that knowledgeable about Planned Giving and know exactly how to cultivate and communicate with each specific donor." According to McKay-Todd;

"The feedback on the callers was very positive; in fact there weren't any negative comments. Of all the individuals called, 12% agreed to include us in their estate plans, which were higher than anticipated, and four times what we could have achieved with our current staff resources."

Founded in 1995, Legacy Leaders is a pioneering company trusted by North American nonprofit organizations that want to get the most from planned giving products and services. The Company focuses on the implementation of bequest, annuity, and life insurance solicitation programs. For more information on how Legacy Leaders can benefit your organization's planned giving expectancies, visit the Legacy Leaders website at www.legacyleaders.com .

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