TOP 10 WAYS TO BUILD A SUSTAINABLE SOURCE OF FUTURE REVENUE THROUGH A PLANNED/LEGACY GIFTS PROGRAM

In an environment where many development professionals wear many hats and are asked to do more with less time and budget support, it seems counterintuitive to invest time in a program that—on the surface—doesn't reap immediate rewards. But, studies show that by inviting our donors to make legacy gifts, our organization can benefit—now and in future years. In fact, many donors who make bequests increase their outright giving in the subsequent 5 years by 75% and IRS data shows that bequests are the largest type of gifts, averaging 2.74 times a donors' total lifetime giving. So how can we invest minimal time and resources into a program to create sustainable revenue for our organizations? And boost our donors' current giving all at the same time? Join this session to learn more from the practical and legal perspectives, receive tools and templates to take back to your organizations and jump start your program immediately.

LEARNING OUTCOMES:

By the end of this hybrid fireside chat-workshop session, attendees will:

- Understand how to simply and effectively launch or reboot a planned/legacy giving program, with limited time and budget
- Learn how a planned/legacy giving program complements and boosts your major and annual giving program
- Learn how best to work with attorneys during the gift planning and receiving process
- Receive a toolbox of templates to immediately start building a simple infrastructure for a planned/legacy gifts program
- Learn numerous cost-effective marketing and stewardship strategies for promoting and cultivating a new/revitalized planned/legacy gifts program
- Acquire and practice simple discussion prompts to use when speaking with donors
- Discuss a few case studies with fellow participants

PRESENTERS:

Julie Captain, Senior Director, Major Gifts, Shirley Ryan AbilityLab
Kirk A. Hoopingarner, Partner, Quarles & Brady, LLP

Julie Captain, Senior Director, Major Gifts, Shirley Ryan AbilityLab

Julie Captain, Senior Director, Major Gifts at Shirley Ryan AbilityLab, has revitalized and leads the organization's planned giving program, in addition to generating major and principal gifts. Previously, she invested nearly 19 years at Northwestern Medicine in a variety of roles, most recently serving as Director of Development and Planned Giving at Northwestern Medicine Lake Forest Hospital, co-leading their $150 million *Our Legacy. Our Future.* campaign.

Julie's professional forte is in creative gift planning and has been heavily involved with the Chicago Council on Planned Giving throughout her career. She joined the Board of Directors in 2007, has participated on numerous committees and served as its President from 2011-2013. Julie also served on the Evanston Community Foundation board from 2010 – 2013. She completed Leadership Evanston in 2011.

Kirk A. Hoopingarner, Partner, Quarles & Brady, LLP

Kirk is a partner in the Chicago office of the national law firm of Quarles & Brady LLP, where he practices in the firm's Estates, Trusts and Wealth Preservation and Tax Exempt Organization groups. For over 35 years Kirk has concentrated his practice on all facets of wealth planning, trust and estate administration and philanthropy.

Kirk has been actively involved in the Chicago area philanthropic community, having served as President of the Corporate Responsibility Group of Greater Chicago, Chair of the Evanston Community Foundation, Chair of the McGaw YMCA of Evanston, and President of the Evanston Township High School Foundation Board. He is currently serving on the professional advisor committees for the Ann and Robert H. Lurie Children's Hospital of Chicago Foundation, the Chicago Zoological Society, and the Lincoln Park Zoological Society. He has also been serving as a Director of The Davee Foundation.

Kirk serves on the Editorial Advisory Board of Planned Giving Today, is an adjunct professor in the Northwestern University Law School LLM tax program where he is co-teaching a course on tax exempt organizations, and is on the Center of Influence Advisory Council for US Trust and the Advisory Council for American Endowment Foundation. He is also a fellow of the American College of Trust and Estate Counsel where he serves on the Charitable Planning and Tax Exempt Organization Committee.