

As a leader of a nonprofit organization, you are aware of the ever expanding demand for services and the funding gap you will most likely continue to face. Challenges presented by a strained economy, competition, and limited resources have prevented you from devoting the attention you know that is needed to grow your endowment assets. Perhaps misperceptions about who are your best planned giving prospects and unfamiliarity with planned giving vehicles has also resulted in minimal activity. Even if you're receiving an occasional bequest that came as a great surprise, the potential is much greater. If your organization isn't actively pursuing planned giving opportunities, your competitors will. The time is now!

**“Your Planned
Giving Program”
is designed for you.**



BLOOM METZ CONSULTING

going the distance

2812 Landon Drive
Wilmington, DE 19810

YOUR PLANNED GIVING PROGRAM



**A practical and affordable
opportunity for your
nonprofit organization
to invest in your future.**

YOUR PLANNED GIVING PROGRAM



Through "Your Planned Giving Program", Bloom Metz Consulting is pleased to offer the opportunity to have the benefits of an in-house planned giving professional for a fraction of the cost. We have established a team of charitable gift planning professionals and invite you to participate. For a total fee of \$2950, your nonprofit will receive the following:

Your greatest legacy for future generations could be a more financially secure organization. While many small-to-mid-size nonprofit organizations rely on the proceeds from fundraising events and annual campaigns, very few have a program designed to build for the future through planned gifts yet the statistics are black and white:

- By the year 2055, some \$41 trillion will change hands as Americans pass on their accumulated assets to the next generation.
- Less than 10% of nonprofit donors have made plans to include a nonprofit organization in their estate plans.
- The primary reason why people don't include nonprofit organizations in their estate plans is because they haven't been properly educated and asked.
- Building an endowment fund requires discipline and leadership who will hold each other accountable to do what they say they're going to do.

1. A seven hour intensive training program for up to 3 representatives of your organization. The deliverable will be an educated and motivated team to pursue specific planned giving opportunities for your organization. Limited size will ensure personal attention.
2. Quarterly review meetings with program participants over the course of a full year following the initial training.
3. Two face-to-face visits with a planned giving expert and your best prospects.
4. Access to a planned giving professional, available for telephone consultation regarding identified prospects.
5. Periodic follow-up to help focus your organization's efforts.

For further information please contact:



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*We can help your organization
secure its future.*

