



Peak
9860

MOTIVATE
 **MONDAY**

September 16, 2024

About Peak 9860

Peak 9860 (*said as “Peak Ninety-eight Sixty”*) is a professional firm committed to making effective charitable estate planning accessible to every nonprofit organization...regardless of size.

Peak 9860 is focused on securing the future of your mission using fractional planned giving directors, each with decades of experience. We offer both a “done for you” service (serving as your laser-focused staff) and advisory work (helping you and your team make planned giving successful). Either way, you get the seasoned professional for the time needed to accomplish your goals.

One of the things that sets Peak 9860 apart from others is that when we partner with you, your donors remain your donors, and the donor relationship remains with your organization (including interactions added to your CRM). Your fractional staff is working on your behalf.

Another area of distinction is our foundational knowledge that every nonprofit is unique, and we tailor our approach based on your specific needs. There is no “one size fits all” with Peak 9860.

We’ve seen the most program success with small to mid-sized non-profits that have received the majority of their funds from individual donors for at least five years (the longer the better) and have at least one development professional. This doesn't mean grant-focused nonprofits, program fee heavy organizations, or organizations that’s not yet hired development staff can't have successful planned giving programs, only that it requires a different approach.

We've had success with all sectors: education, human services, churches, advocacy, animal welfare, youth services, senior housing, and others.



About Christopher McGown

Co-Founder and Principal

Chris has worked in nonprofit development for more than 30 years. He has served in every area of development, with the longest stints in Planned Giving and team leadership. He has managed a personal portfolio of donors as well as teams of professional fundraisers.

Chris has personally cultivated more than \$95 million in planned gifts, which does not include the more than \$230 million he actively worked on with his team. In addition to the array of planned giving tools, Chris has also secured more than \$75 million in outright gifts as part of annual and capital campaigns.

With the belief that when the non-profit community is strengthened, every non-profit benefits, Chris has also consulted both professionally and in a volunteer capacity with a variety of non-profit organizations including special needs youth groups, character building programs, animal care organizations, and churches.

Chris holds a bachelor's degree education, a master's in psychology, a master's in marketing and a Juris Doctorate.

His other accomplishments include being a published author, an Eagle Scout, and an all-around great guy. He lives in Louisville, Kentucky with his beautiful & patient wife, Angela, and his youngest son; Chris' oldest son is in college in Maine.



What Is Planned Giving

Living Gifts

VS

Legacy Giving

VS

Planned Giving

VS

Deferred Giving

VS

Charitable Gift Planning



What Is Planned Giving

Living Gifts

=

Legacy Giving

=

Planned Giving

=

Deferred Giving

=

Charitable Gift Planning



What Is Planned Giving

It is NOT

“The tax character of property acquired by a person from the estate of a decedent whose testator and executor opted out of the estate tax regime and is the same as it was in the hands of the decedent.”

It IS

An intentional method of giving in which a donor includes a nonprofit among their spouse, family, and loved ones (in legal and financial documents.)



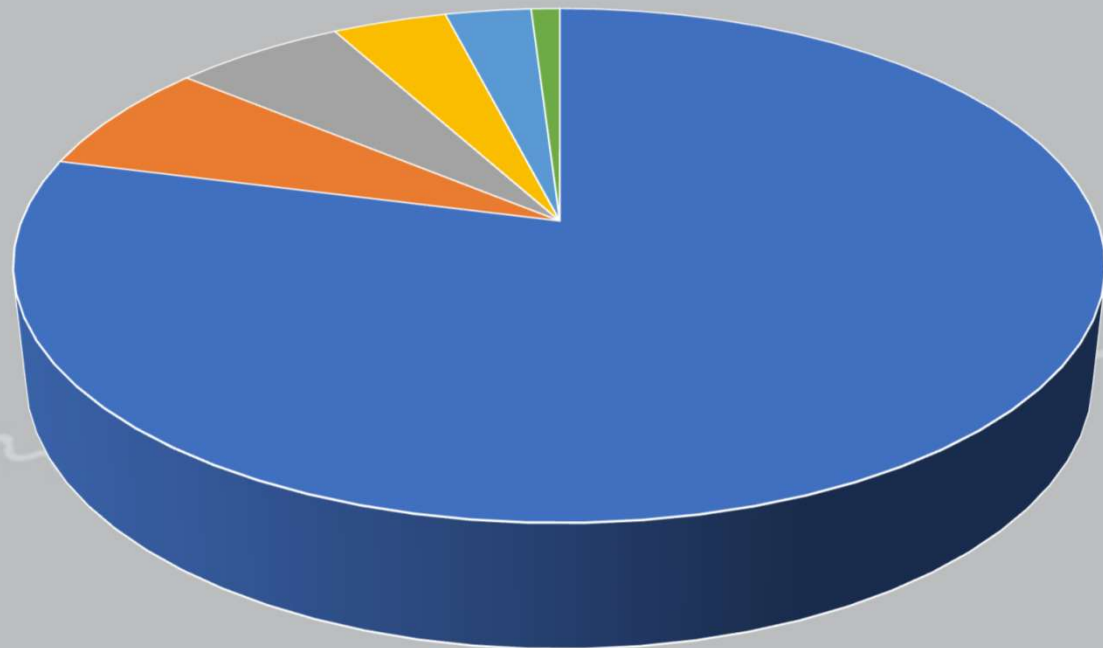
Why Planned Giving

- Planned Gifts tend to be larger than outright gifts. In fact, they are often the largest gift the donor can or will ever give.
 - Average gift by Will is more than \$78,000
- Donors don't see Planned Gifts as a sacrifice, but as an extension of self. Placing your organization in the same lasting documents as their closest loved ones.
- Planned Gifts have been shown to increase outright (annual) giving and significantly improve donor retention rates.
- While there is a "typical" Planned Giving donor, nearly every donor is a prospect for a Planned Gift of some type.
- The most common Planned Gifts are simple to talk about and market. They can be executed by your donors with little or no cost and with very little effort.



Planned Giving By The Numbers

Percentage of Planned Gifts by Type



- Gifts By Will - 79%
- Gifts Through Retirement Assets - 7%
- Gifts of Life Insurance - 6%
- Charitable Gift Annuities - 4%
- Charitable Trusts - 3%
- Other - 1%

92%

require no special training
to talk about with donors



MOTIVATE -MONDAY



Launch Steps



Launch Steps

Get leadership buy-in and support

- Time & attention
 - Long term commitment
- Policy changes/additions
- Designation preference
- Reallocating marketing space
- Perhaps some budget
- Agreed upon goals
- Their (inspirational) gift & story



Launch Steps

Determine Organizational Focus

- Donors are in control, and
 - Donors care about you
- Primary and secondary
 - Different areas
- Specific suggested wording
- Will impact (drive) marketing
- Consistency of use
- Supported by policy



Launch Steps

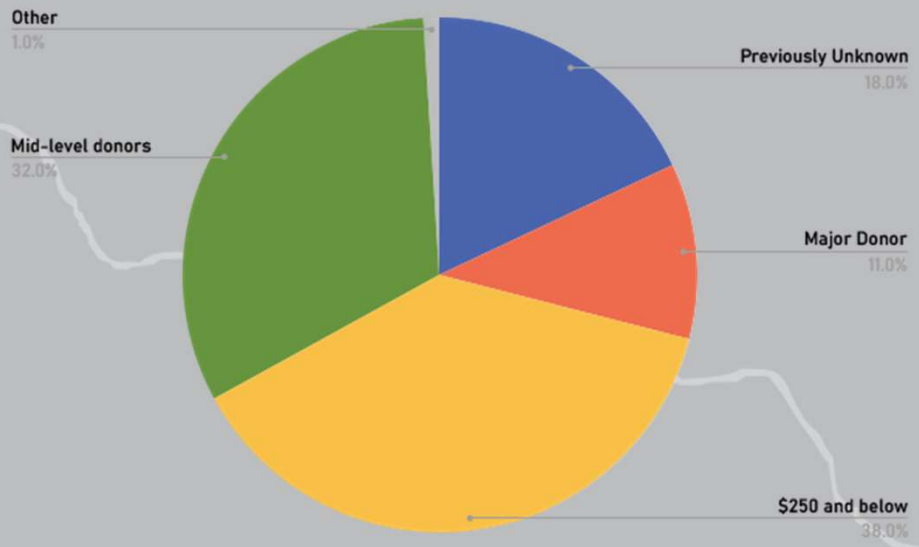
Align Policy

- General Gift Acceptance policy
 - Planned Giving Specific
 - Free training 9/30 11:00
 - Peak9860.com/resources
 - Widely known and understood
 - Written and institutionalized
 - Promotes integrity of support
 - Updated as needed (adding to)
- CRM Notations
 - Constituent & Gift
- Gift Credit
- Back-up for complex questions

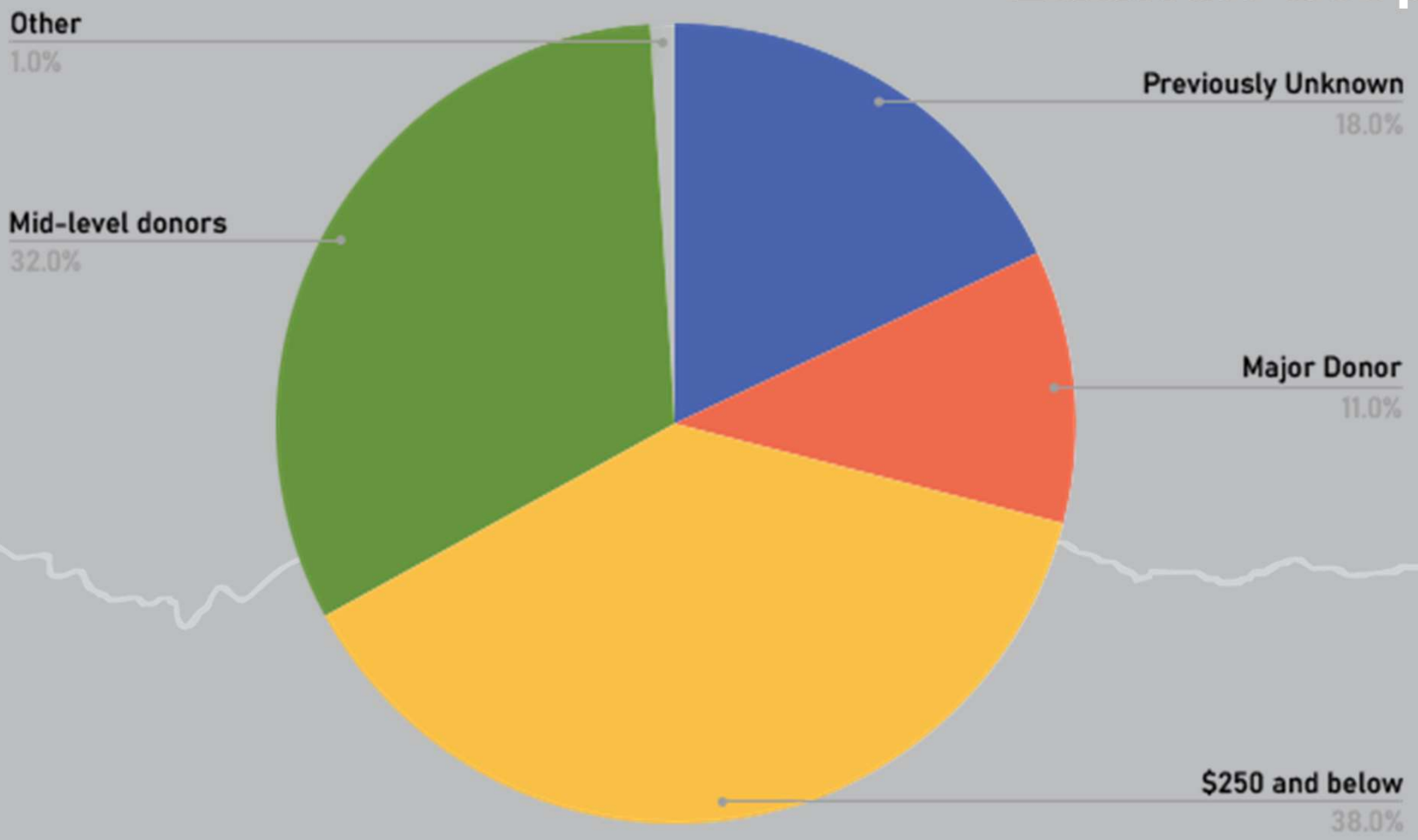


Launch Steps

Prospect Identification



Launch Steps **4**



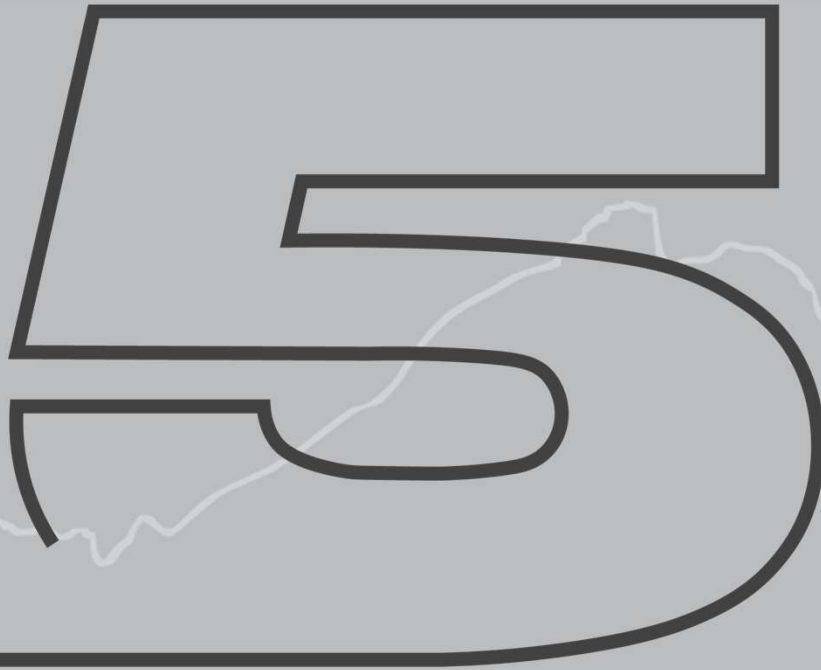
Launch Steps

Prospect Identification

- Start with those closest
- Existing major donor prospects
- Duration & consistency
- Self-identified
- Update CRM
- 3/8 = Success



Launch Steps



Market The Future

- Insert into existing opportunities
 - Broad, frequent, & consistent
- Use organization focus wording
- Tell donor stories
- Share (planned) gift impact
- 3/8 = Success



Next Steps

- 1) Expand audience (introduce into public activities)
- 2) Tailor Mass Messaging – message and channel(s)
- 3) Database screening
- 4) Legacy Society
- 5) Cultivate, Educate, Congratulate...repeat



Upcoming Webinar

Planned Giving Policies with Integrity

September 30, 2024 || 11:00 a.m. (et)

A complimentary, one-hour webinar
where together we look at how to
craft, update, and honor
planned giving gift acceptance policies

Learn more and save your seat

www.Peak9860.com/resources



Thank you!



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