The Biggest Problems with Planned Giving (and What to Do about them)

A white paper from Veritus Group to help you succeed in planned giving.

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The Biggest Problems with Planned Giving (and What to Do about them)

What you’ll learn

- What the major misconceptions about planned giving are.
- How to think about each of those misconceptions.
- The steps you need to take to get a robust and effective planned giving program operational in your organization.

Donations through planned gifts are the deepest expression of donor commitment to your organization. In the midst of a great transfer of intergenerational wealth, most charities are unaware of the existing planned gift donors residing in their database.

More importantly, there are many potential new planned gift prospects ready to hear about how they can support your charity in ways which benefit them and the charity they love. This leads to larger planned and major gifts, as well as a path to assure that those who have already remembered your organization will be stewarded.

The Problem with Planned Gifts

Most of what everybody knows about planned giving is wrong.

Traditionally, planned giving has been seen as a vehicle for the elderly, to make gifts at death. They have often been called deferred gifts, assuming that one needs to wait for them to “mature.” As you will see in this white paper, there are implications for gifts made in the short term, as well as current and major gifts. And deferral of a gift does not always mean the gift will generate income when the donor has passed away.

Common Misconceptions

Age is a factor, but common knowledge often makes it the most important factor for charities to consider. It is common for a researcher at a charity to find a person with
significant wealth and assign that person to the planned giving officer (PGO) just because the prospect is of an advanced age. This happens even though the prospect has never given to the organization before. The ignorance of the real reasons people make planned gifts is so common that these charities not only fail to get a planned gift, they throw away the opportunity to get current gift support, and depending on the situation of the prospect, fail to get a major gift as well.

Often an organization has a stockroom full of planned giving brochures which cover all the planned giving options from A-Z. Likewise, most organizations focus their planned giving efforts, especially in marketing, on the tax and income implications of a variety of complex, and often irrevocable, planned gifts. Often there is undue emphasis on the income tax savings generated by charitable deductions, and often even on the estate tax savings a gift might create. This is a misguided focus for any planned giving program.

One sees this in the complexity of the materials coming out of most planned giving marketing companies, and in the websites that are hosted by these companies. They focus on charitable remainder trusts, tax calculations, income generated from the gift, and on technicalities like the impact of the Applicable Federal Mid Term Rate (AFR) on the deduction. Many of the websites are too complicated for an average donor to manage.

Perhaps most importantly, there is a fear that planned giving is a complex and scary series of concepts, requiring that the charity have attorneys and other experts on staff, often without a clear plan on how to manage such professionals.

**What the Data Actually Shows**

What the data actually shows is that planned giving opportunities are more broadly based and focused on the connection of the donor to the organization.\(^1\) We now have a wealth of data from studies and surveys done over the past 30 years, which shows us some pretty clear trends about what types of people are actually becoming planned gift donors, and what motivates them. It is emphatically not just old people, rich people, or people interested in tax benefits. The most important predictors of planned gift donations are from individuals who have had long-term relationships as donors and volunteers to the organization.\(^2\)

> “The data actually shows that planned giving opportunities are more broadly based and focused on the connection of the donor to the organization”
Starting at the most basic level, studies from the 1990s and early 2000s indicated that the percentage of people with estate plans, and who had left charitable gifts in those plans, varied between 6% and 8% of the population. There is also a common belief that only about 10% of people die with a will. This is also a misconception that appears to be way off the mark.

The existence of an estate plan varies with the age of the individual, and the older the individual is, the more likely they are to have an estate plan. By the time one reaches their 70's and 80's, well in excess of 75% of those surveyed have an estate plan. Additional data shows, on average, 50% of those 55 or older have some type of will or trust.

Recent data also shows that while on the whole, 5% of those with an estate plan have a testamentary charitable gift, something in excess of 9% of those individuals over 50 have a charitable gift in their will or trust. When looking at an entire database, we feel that an average of 8% of those with wills or estate plans have some type of charitable gift contained in them. The longer the length of the relationship to any organization, the more likely that a gift will come to the organization from that donor. An individual who has been giving consistently for 30 years or more, especially if there is some type of volunteer relationship, has a very high likelihood of a planned gift to the organization.

So once again, it is the strength of the relationship and not the age of the individual that is the most important factor. Charitable gift annuities are generally created by individuals between the ages of 75 and 79, charitable remainder trusts generally are created between the ages of 70 and 74, and the average age of a bequest donor at death is 88. Many individuals who have a will at the time they pass away created their first will much earlier in life, often in their 40s. The communication about various planned giving concepts needs to begin with your larger database, focusing on the most loyal donors, irrespective of age.

What does that tell you about planned gifts in your database?

What it clearly indicates is that a certain percentage of donors in your database already have made a planned gift to your organization. Also, there are a number of people within your database who are very receptive to creating an additional planned gift, especially since one of the main criteria for finding good planned gift donors is identifying those people who have given a planned gift to any organization, not just yours.
If your organization has an existing planned giving society or recognition group, you are on the right path. However, too many organizations have a planned giving society and they don’t really do anything. Truthfully, many organizations “get the agreement” and then forget about the donor. The data shows that those people who have remembered your charity in their estate plans only have a 50% chance of following through with that gift when they pass away. But it doesn’t have to be that way! Good stewardship with those individuals from the time they’ve created the gift until the time that they pass away is crucial in maintaining the gifts in those estate plans.

Finally, in this area, every study indicates that individuals who are willing to make planned gifts are significantly less interested in the tax consequences of those gifts. One study indicated that the primary motivation of tax savings only affected 17% of those who were making planned gifts. Recent tax law changes significantly decreased the number of people who can itemize charitable income tax deductions. This means that selling a planned gift concept using tax savings is a misguided approach. One other misguided approach is to address federal estate taxes as a major issue. New federal estate tax laws mean that only 0.1% of the population are affected by estate taxes; consequently 99.9% of your database is not affected by federal estate taxes.

More Planned Giving Misconceptions

There’s often a pervasive view that the best way to reach planned gift prospects is via snail mail, email, and other hardcopy approaches. This is coupled with a feeling the donors are hard to engage, and won’t share information about their estate plans, financial situations, and family situations. Another misconception is that the Planned Giving Officer (PGO) who meets with the donors or prospects needs to be a lawyer or highly trained professional in the technicalities of planned giving. Of course, part of this thought process is based on the idea that communicating tax savings and income implications to the donor is most important to them.

First, a donor who is a qualified prospect for making a planned gift is by definition somebody who loves what you do. Since studies show that people make charitable gifts based on their confidence in the organization, their relationship to it, and the belief that they can make the kind of change that the charity says it can, donors want to hear more about what the charity is doing. That may take place on a variety of different platforms, since people like different types of communication. But many donors are ready, willing and interested in hearing from a PGO about what is happening within that charity.
Since tax savings are a less important concern than is generally believed, a PGO needs to be able to tell the story of the organization, and then put it in the context of what types of planned gift opportunities can support its work. Also, the level of technical expertise needed to communicate what’s important to donors is less detailed than most organizations think. What’s important is the story, not the details of tax savings and income needs. Once the individual is motivated, planned giving really becomes a discussion about the best method to serve the donor’s pre-existing charitable needs. Many of the technical questions can be answered with software.

**Lead Generation**

*Planned Giving Lead generation is an issue for most organizations.* Charities have depended upon hardcopy direct marketing efforts for many years in planned giving. Most newsletters focus on tax benefits, increased income and capital gains saving, which for the vast majority of recipients is not on their list of motivations. Moreover, these pieces tend to be too technical for the audience.

Brochures on Charitable Remainder Trusts, Charitable Lead Trusts, and other complex planned gifts do not work as mass marketing subjects, since so few people are positioned to benefit from them. The average size of a new CRT can be over $500,000 in highly appreciated assets, and a CLT for estate tax purposes is useful to only 0.1% of the population, meaning too few people can use these vehicles.¹⁶ This is not where marketing funds should be spent.

Hardcopy direct marketing has shown a marked decline in response for the past couple of decades. Even when it is successful, generating many leads, most organizations don’t have a plan on how to effectively follow up on all of those leads. Often the approach to reach out to the people who have asked for help via a passive, impersonal email or letter, rather than a personal call asking for a meeting.

**Donor Qualification**

Donor qualification is a critical issue, and it’s important to make sure that direct contact is made with an individual to determine their actual level of interest, and whether or not they should be assigned to a PGO. Most organizations don’t have a function to help qualify leads before transferring them to a planned giving officer who will connect to cultivate, solicit and close new planned gifts. Ask yourself, do you really want a highly paid PGO to sift through hundreds of planned giving leads? I don’t think so.

“Hardcopy direct marketing has shown a marked decline in response for the past couple of decades.”
Your Staffing Plan

Closely related to lead generation is the organizational need for the right staffing plan, with an assessment of the staff’s knowledge base and what training is needed.

It’s not always exactly clear what the role of the Planned Giving Officer (PGO) is. Is it to qualify new leads, work with planners, do marketing, and work to develop strategies with major gift fundraisers? In our view, a PGO needs to be a front-line fundraiser, focused on cultivation, solicitation and closing new planned gifts. Nothing more.

A PGO does not need to be a technical expert but should have sufficient knowledge in the area to be able to discuss knowledgeably questions which come up. Each staff person needs some kind of training, and in assessing the needs and capacities of each staff, the charity should determine what that area is. It may be that the person needs more training in, for example, technical planned giving, solicitation, or another area of fundraising knowledge or practice.

Let’s take a look at the three functions of the ideal staffing plan that we have identified as important to running a productive planned giving operation.

1. **The first is the PGO.** This is the front-line fundraiser visiting a well-qualified portfolio, cultivating them towards a planned gift, soliciting them for one and then closing the gift.

2. **The next is prospect qualification.** Prospect qualification is just what it sounds like. By assigning staff to work in qualification, you’ll assure that the planned giving officer is meeting with people who have been identified as having a valid interest in planned giving and in the organization, and are therefore worthy of the time and effort of a full-time fundraising solicitor.

3. **And the third is donor stewardship.** It’s important to make sure people who have identified themselves as planned giving donors continue to feel connected to the organization through proper stewardship. This can be a time-consuming effort, but it is crucial in assuring the gifts come to fruition. A Planned Giving Associate (PGA) can help create a stewardship plan for existing planned gift donors, organize events and other opportunities for engagement, and devise and implement a communication plan, making sure that donors feel they are still part of the organization that they have remembered in their plans.

“A Planned Giving Officer needs to be a front-line fundraiser focused on cultivation, solicitation and closing new planned gifts. Nothing more.”
**Staying on Top of Tax Laws and Technology**

In the many years since the 1969 Tax Act which created charitable remainder trusts, many changes have happened in planned giving law and practice. Staying on top of the frequent changes in the US Tax Code is one of the ways to make sure that your donors are updated and cognizant of new opportunities that exist for additional planned gift donations. In planned giving, not all the changes that are important happened in the US Congress. Charitable gift annuity rates are changed by the American Council on Gift Annuities, a non-governmental organization. It’s important to know when those changes occur, because they give you interesting marketing opportunities for your donors.

The only thing that has changed more than the Tax Code during that time has been technology. In the early 1980s, most planned giving calculations were done with a pencil, paper and occasionally a calculator, along with enormous IRS Factor books. Since then, we have progressed from spreadsheets and databases to planned giving software, to online database systems, which are now supplemented with apps. Staying on top of some these developments, along with the changes in the laws related to planned giving, are all real issues for many organizations.

**Steps You Need to Take**

In this time of major planned giving potential, here is how you take planned giving from an ineffective operation to a strategic success.

The Veritus Way of Planned Giving has a few simple steps to take:

**First Step: Assess Your Current Program**

**Do an assessment with Veritus Group.** It is easy and Veritus provides clear guidance on what data is needed.

Veritus focuses on a variety of data, not just on giving. Although wealth, age and giving are all relevant, there are other factors to be tracked, including length of giving, number of gifts, volunteer status, previous types of gift assets, and previous planned giving history. There is a lot of research data to apply to this information to help show the real potential for planned giving success.

There is no obligation to work with us, but we will present our findings and tell you exactly how we can help to raise new planned gifts, provide a suggestion for staffing, staff management strategies, and a revenue forecast.
The Assessment reveals the Solution with The Veritus Way of Planned Giving.

From this assessment, Veritus Group will create a 5- to 10-year forecast and plan for planned giving.

First of all, we can project how many people in your database have made a planned gift already (and need to be identified and stewarded). We can also project how many others in the database have a propensity for a planned gift. This will determine the number of full-time-equivalent staff are needed as PGOs to cover that workload, and it will also begin the process of determining how many PGAs you need for qualification and stewardship purposes.

Once you begin to understand the gold mine that is contained in your database, you’ll begin to see that planned giving isn’t simply for large charities with lawyers and technicians and staff, but it’s actually something that lives within your database right now. The Veritus planned giving assessment will provide you with a road map to work with planned giving effectively over the next 5 to 10 years.

As was mentioned earlier in this paper, about half of individuals who indicated that they have left a planned gift to an organization in a will or trust eventually will not go forward with that plan.18 The Veritus planned giving assessment will help assure that you know how to find the people who’ve left your organization in their plans, so they can be effectively stewarded.

Step 2: Fix Your Lead Generation

Planned giving lead generation is misguided even when it works. By using Veritus’ planned giving assessment, we can begin the process of determining what the best platforms are for your organization to communicate planned giving. While most organizations have spent marketing resources on hardcopy, overly technical planned giving brochures and mailers, we can begin to look at new ways to create new leads for new types of planned gifts.

E-surveys, social media marketing and paid search placements are new ways of communicating with your donors, communicating planned giving and generating new leads. Direct marketing methods, using hardcopy and other methods, may still be part of the mix, but only after an honest analysis of what works and what doesn’t. Part of the marketing analysis can also determine how many leads are useful within a certain time period. For example, can the staff handle 20-50 leads a month? Or do they need a more finely-tuned number of leads depending on staffing?
Step 3: Put in the Right Staff with the Right Position Descriptions

Once an assessment is done of your database, an honest projection of individual fundraiser portfolios will help determine staffing needs. Earlier we mentioned the three principal functions for the proper running of an effective planned giving office: front line fundraising by a PGO, qualification by a PGA (Planned Giving Associate), and stewardship, also by a PGA. Now, to be clear, this three-function concept is relatively new to the world of planned giving. But, in our opinion, it is very important to think about and plan for executing your distribution of labor in this way.

Much of the decision on right-sizing the staff is directly related to the size of the database and the number of potential planned giving prospects identified. So, if you have enough volume you could justify adding all three functions with staff covering each one. If you don’t have enough volume, and many smaller organizations don’t, then be sure you plan for covering the functions with the staff you do have. That’s fine. The major point here is that your staffing plan and distribution of work needs to assure that all three functions are covered.

A plan about what type of staff you need and their position description will need to be developed. It’s a given that the primary PGOs in your organization should be focused on cultivating, soliciting and closing new planned gifts. PGOs should meet with qualified leads only, and in analyzing the database, consideration needs to be made about how qualification of existing and new plan gift prospects takes place. A Planned Giving Associate should focus on qualification of new leads. This will assure that the individuals assigned to the planned giving officer are only those who are ready and willing to meet, be cultivated, and ultimately solicited.

One of the most important functions coming out of a database analysis is determining which individuals need intensive stewardship. This will lead to further cultivation for additional planned gifts, as well as solidifying the planned gift that they already have committed to. A PGA is an ideal position to handle the stewardship for the organization, creating a stewardship plan, implementing it and planning events and other contact points for existing planned gift donors.

Look for “The Right Stuff” in a potential planned giving officer.

Although most organizations would tend to look for somebody with financial or legal experience and possibly even a law degree, the real talent needed in a PGO is an
ability to be a good fundraiser. In our experience, a good candidate knows how to work with individuals, cultivate them by listening to them and finding out what is important to them, and analyze their estate and financial planning needs.

Important skills for a PGO include strong abilities in interpersonal communication and an ability to work strategically to provide the donor with a personalized plan focused on donors’ interests and needs. They should be able to work with many different personalities and motivations, while strategically moving the prospect towards a solicitation and a closed gift.

This type of person does not need to be a technician. It needs to be a person who can work effectively with people and help convince them that the best way to support your organization is through planned gifts.

The PGA may not have technical expertise, but they should have the ability to work with people effectively. Their role is to qualify what donor interests are, and whether they want to work with the PGO. This type of individual is often a person with some exposure to the organization and its philanthropy, while possessing a personality to get to know individuals and whether or not they are ready for the planned giving officer, assessed over phone and sometimes email.

**Step 4: Implement Best Practice Metrics in Managing Your Staff**

Effective staff management takes place at a number of levels. First and foremost, an appropriate portfolio needs to be assigned to each staff member, with clear ideas as to what their role is with regards to their portfolio. We think a portfolio for a PGO whose primary role is to cultivate solicit and close new gifts should be approximately 125 names.

Management of staff requires an analysis of how assigned names are being worked with, along with discussion about who should continue to be held in the portfolio, and which names should be taken out and replaced with new leads.

Appropriate metrics for the PGO are set in terms of expectations of cultivation moves, the number and value of solicitations, and the number and value of closed gifts. This will always vary with the organization and with the individuals involved, but we can make some basic suggestions about what is appropriate for an average planned giving officer.

We feel it is realistic for a PGO, with a qualified portfolio, to work at the level of approximately 100 moves a quarter. These should be cultivation moves, solicitation moves, and closing moves, and these
need to be face-to-face as much as possible. We look for 35 to 50 planned giving solicitations in a calendar year. The value of the solicitations will vary, but an average charitable bequest is approximately $40,000, meaning the value of the solicitations would vary from $1.4 million to $2 million a year. Experienced staff will solicit more and larger planned gifts as time goes by. From this level of solicitation, we look to close 15 to 30 planned gifts a year, with the value of $600,000 to $1.2 million a year per PGO.19

One of the main deliverables of having a PGO is their strategic work with the major gift staff and others involved in front line fundraising. Individual solicitation plans should be built for each qualified donor within the portfolio of each fundraiser. This has the additional benefit of making sure that all donors are having multiple methods of giving offered to them, usually bringing larger annual fund gifts, major gifts and, as time goes on, larger planned gifts.

The Veritus approach to working with organizations is to help them determine and develop exactly what they need in terms of staffing. We help develop position descriptions, analyze exactly what is needed in each position, hire the right person to fill the position, and then manage the individual to success. Once the position is on staff, Veritus Group assists in creating the right goals and objectives for the staff, and determines what names are best assigned to the portfolio. We meet with the planned giving staff on a weekly basis for an hour to discuss strategies, successes, and where they are in terms of their metrics. This approach helps assure that the planned giving staff members are on track to meet the goals set with them.

A talent assessment needs to be made of all planning staff. There are a lot of organizations providing planned giving seminars, and most of them focus on the planned giving technicalities that we discussed earlier. Many times, there are better training opportunities in sales and marketing than in dedicated planned giving seminars. Veritus Group can help with a talent assessment, and determine what areas of training would be most effective to help a planned giving staff person

**Step 5: Keep Up-to-date with Tax Laws and Technology**

It is important to keep up-to-date with the ongoing changes in tax laws and technology. You need to have a system to do that or be plugged into a source, like Veritus Group, to provide that information to your planned giving staff. As demographic and technological changes rapidly affect society, the Veritus Way of Planned Giving brings you the perfect intersection of new technology and personal relationship.
Step 6: Double Down on Stewardship

Stewardship has become such an important factor in making sure planned giving success takes place. The creation of an effective stewardship plan is one of the most effective ways to make sure that your investment and planned giving continues to generate the income that has been committed. This can take a variety of ways. For example, the creation of a planned giving society, the planning of events, recognition opportunities, and individual tours or other opportunities addressing donor interests.

Among the metrics for success in planned giving stewardship is the number of people who have self-identified as planned giving donors, either through a society or recognition group. This allows us to build a stewardship plan for those individuals, breaking out opportunities for them to interact with the organization, continue to be involved, and learn as much as possible, not only about the organization but about new planned giving opportunities.

The Intersection of Major Gifts and Planned Gifts

Another thing we pay attention to is the intersection of major and planned gifts. Let’s face it – these two “camps” are often managed separately, compete with each other for “credit,” and often don’t talk to each other. It’s like your family doctor, the general practitioner, never talking to or relating to the specialist! Crazy.

We’re talking about ONE individual person here – one donor who has cash and assets and who is currently living but eventually will pass away. It’s one person whose philanthropic needs should be comprehensively addressed. But we often don’t manage it that way. That’s why we feel so strongly about how these two gift-giving methods come together, and why the passage between them must be navigated carefully. Because it’s populated with your best donors who must be treated with great care and receive the professional attention and interaction, they’re accustomed to and expecting it.

Make sure the functions of planned giving and major giving are totally integrated. End the usual competition in these areas. Treat the donor as one person instead of two halves.

Protect Your Donors from Abuse

There’s one more reason to beef up your planned giving efforts as we have outlined in this white paper. Your good service in this area will also protect some of your most valuable donors from abuse.

Lisa Gibbs, writing in Money Magazine, tells the story of how a local insurance agent “persuaded Art Tener, 79, a retired auto dealer service scheduler, to roll $113,000 in
savings he had in annuities into new deferred annuities that handcuffed the money for up to 16 years despite a terminal illness that doctors said meant Art had less than two years to live.”

Art’s son Jim, 52, said: “Instead of enjoying what turned out to be the last nine months of his life, he didn’t have $100 to spare.” The article went on to say, “One out of every five older Americans has been sold an inappropriate investment, paid excessive fees for a financial product or service, or been a victim of fraud.”

Here’s the reason we include the topic of abuse in this white paper. Don’t think for one moment that every major donor on your file has available to them the services of advisors that will help them not only plan but also avoid getting taken advantage of. Many do. But many do not.

And if you accept the premise that planned gifts, when holistically applied to your good donors, includes ALL the advice related to the wealth of an individual – then you have to include in your services to donors everything that looks at current cash and assets, future disposition of cash and assets, plans that are in place or need to be put in place, AND protections against fraud.

Does all this sound like your donor has an incredibly good friend watching out for every aspect of their finances? Yes! That’s the point – a partner who walks with them – and someone who thinks holistically about it all. Now to be clear, a MGO or PGO should never take the place of a legal or professional advisor. The role we are suggesting here is that you’re a good friend who is “another set of eyes” to make sure things are in order and done right.

In closing, here are some of the questions you should ask yourself when evaluating your program:

1. **Are you operating with the right philosophy?** By this, we mean a holistic approach that genuinely cares for and serves the individual – even if it means helping them give to organizations other than yours. We also mean a service that’s watching out for your good donors as well and making sure they’re not victims of fraud.

2. **Do you have the right program design?** Besides all the traditional planned giving methods and approaches, do you have in place an effective and efficient structure, strategy and staffing plan as we’ve addressed here? And is the program integrated with the major gifts program? It must be!

3. **Is your communications/marketing plan strategic?** Do you have a case for support for planned giving and regular, consistent messaging? Do you have a lead generation and follow-up strategy that actually works and is effective?
Most plans we see in this area aren’t effective and don’t work. And it’s no wonder that planned giving revenue is practically non-existent!

4. **Is your staff following up on the leads that are generated?** We often see leads ineffectively followed up on when a strategic plan for the donor is needed.

5. **Do you have a wide array of gift options?** There are so many of them – you need to be able to offer alternatives to your donor and know which gift options are feasible for your organization.

6. **Do you have the right staff?** Selecting the right team or assigning the planned giving functions among personnel is critical. Even experienced staff need ongoing training, and entry-level staff will need more.

7. **Are you managing properly?** The program must be managed to assure best practices and integration of effort, to eliminate competition between MGOs and PGOs, and to make sure every area of planned giving is appropriately executed.

8. **Do you have competent and up-to-date technical support?** Some level of legal and tax knowledge in a narrow area is helpful within the staff ranks. But what’s critical is knowledge of boundaries and access to qualified expertise when required for particular cases.

We can’t emphasize enough how important it is to make sure you’re doing this area right, both for the revenue it can bring to your good cause but also for the great and needed service you can provide your good donor.

**Summary**

- The demographics and recent studies about attitudes to planned giving show that this is the most important time to find and cultivate the planned giving prospects in your database and it’s the best time to find new names through effective lead generation.

- A new way of thinking about planned giving is needed as we have outlined in this white paper.

- You need to update your lead generation program.

- You need to divide planned giving work down differently in order to cover the three strategic functions of planned giving: qualification, stewardship and the donor-facing functions.

- Set up strong management based on best practice metrics.
• Stay in touch with changes in law/technology.
• Outrageously steward those who have and will remember your charity.

The new way of doing planned giving is about the intersection of planned giving, major giving, and technology.

Robert Shafis has been a successful fundraiser, speaker, and attorney for over 30 years, and programs under his direction have accounted for over $750 Million in major and planned gifts. As Director of Major Gift Planning at Chicago’s Museum of Science and Industry, and Director of Major and Planned Giving for The Field Museum, he participated in campaigns of over $200 Million each. Mr. Shafis is a board member of the National Association of Charitable Gift Planners and speaks to national and local groups about planned giving, estate planning, charitable tax issues, and the process of fundraising.

Veritus Group is a full-service mid-level, major gift and planned giving consulting agency serving non-profits all over the world. We help create, build and manage major gift, mid-level giving and planned gift programs by combining donor-centered strategy with solid management that is focused on accountability.

You can reach us on the Web at www.veritusgroup.com or by contacting Amy Chapman at (215) 514-0600 or achapman@veritusgroup.com.

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