

SAMPLE LETTER INVITING CURRENT DONORS (NON-PLANNED GIFTS) TO HELP BUILD ENDOWMENT FUND

(To be imprinted on NPO's letterhead)

(DATE)

Mr./Mrs. (INSERT NAME)
(ADDRESS)
(CITY/STATE/ZIP)

Dear (INSERT NAME):

Thank you for your ongoing support of (INSERT ORGANIZATION NAME). Your donations advance our commitment to (INSERT SHORT MISSION HERE).

As competition for charitable dollars increases and government support continues to wane, we are taking action to ensure that our agency has a solid foundation in the future. Our goal is to build an endowment to help sustain (INSERT ORGANIZATION NAME) with guaranteed revenue streams long after our lifetimes.

We are excited to inform you that we have partnered with Waco Foundation to help us in this effort and to manage our endowment fund. They have a long and successful history in managing and stewarding charitable funds with a record of solid investment performance.

I want to personally invite you to consider helping to ensure our future by making a gift to our endowment fund. You do not have to make a gift from cash now. There are other creative and flexible giving options that can benefit you and (INSERT ORGANIZATION NAME). Consider, for example, donating real estate, stocks, or other assets in return for a more favorable tax benefit. Many planned giving options offer generous tax benefits as well.

Whether it is naming the (INSERT ORGANIZATION **FUND** NAME) at Waco Foundation as the beneficiary of a retirement plan asset, life insurance policy or gifting other liquid or non-liquid assets, we encourage you to consult with your financial advisor to discuss the options. There could be a more attractive and creative way for you to achieve your philanthropic goals and leave a lasting legacy.

The enclosed materials provide an overview of planned giving options. More information is also available on our website, (INSERT LINK).

You need not be wealthy to leave a legacy that makes your core values known to others. Support our long-term success.

Warm regards,

(NAME)
(EXECUTIVE DIRECTOR)

SAMPLE PLANNED GIFT CONFIRMATION LETTER (THANK YOU)

(To be imprinted on NPO's letterhead)

(DATE)

Mr./Mrs. (INSERT NAME)

(ADDRESS)

(CITY/STATE/ZIP)

Dear (INSERT NAME):

I want to personally thank you for your ongoing support of (INSERT ORGANIZATION NAME). Your generous promise of a planned gift helps ensure the long-term sustainability of our mission to (INSERT SHORT MISSION).

I would also like to take this opportunity to welcome you as a member of Pie Society. Pie Society is a community legacy society composed of forward-thinking donors like you who have opted to make their core values known to future generations through one of the many different types of planned gifts.

Why Pie? Think of the accumulation of your wealth during your lifetime as a pie. After your lifetime, that pie gets sliced and shared among your heirs and other beneficiaries. Thank you for sharing a slice of your pie with (INSERT ORGANIZATION NAME).

To show our ongoing appreciation, we will honor you along with other members who have chosen to support us with a promise of a planned gift with (CUSTOMIZE FOR YOUR ORGANIZATION):

- (EXAMPLE BENEFIT #1: Recognition on our website)
- (EXAMPLE BENEFIT #2: Tributes in publications such as X, Y & Z)
- (EXAMPLE BENEFIT #3: Invitation to an annual Pie Society reception)

Thank you again for your support of our mission now and in the future. Your generosity and philanthropic legacy will long be remembered.

Warm regards,

(NAME)

(EXECUTIVE DIRECTOR)

SAMPLE PIE SOCIETY CHARTER MEMBER LETTER – DONOR HAS ALREADY MADE PROMISE OF PLANNED GIFT

(To be imprinted on NPO's letterhead)

(DATE)

Mr./Mrs. (INSERT NAME)
(ADDRESS)
(CITY/STATE/ZIP)

Dear (INSERT NAME):

I want to personally thank you for your ongoing support of (INSERT ORGANIZATION NAME). Your generous promise of a planned gift helps ensure the long-term sustainability of our mission to (INSERT SHORT MISSION).

We are excited to inform you that we are partnering with Waco foundation to help us develop and manage planned gifts. As a forward-thinking donor, you will now become a founding member of our new community legacy society known as Pie Society.

Why Pie? Think of the accumulation of your wealth during your lifetime as a pie. After your lifetime, that pie gets sliced and shared among your heirs and other beneficiaries. Thank you for sharing a slice of your pie with (INSERT ORGANIZATION NAME).

Throughout the year we will honor you and other like-minded members through (CUSTOMIZE FOR YOUR ORGANIZATION):

- (EXAMPLE BENEFIT #1: Recognition on our website)
- (EXAMPLE BENEFIT #2: Tributes in publications such as X, Y & Z)
- (EXAMPLE BENEFIT #3: Invitation to an annual Pie Society reception)

Thank you again for your support of our mission now and in the future. Your generosity and philanthropic legacy will long be remembered.

Warm regards,

(NAME)
(EXECUTIVE DIRECTOR)

SAMPLE PIE SOCIETY INVITE LETTER – ALL AUDIENCES

(To be imprinted on NPO's letterhead)

(DATE)

Mr./Mrs. (INSERT NAME)
(ADDRESS)
(CITY/STATE/ZIP)

Dear (INSERT NAME):

Because of your belief in our commitment to (INSERT SHORT MISSION HERE), I want to personally invite you to become a member of our community legacy society known as Pie Society. The society is composed of generous and forward-thinking donors who will support our long-term success through a planned gift.

Why Pie? Think of the accumulation of your wealth during your lifetime as a pie. After your lifetime, that pie gets sliced and shared among your heirs and sometimes the federal government. I invite you to consider sharing a slice of your pie with (INSERT ORGANIZATION NAME).

It's easy to do. And you don't have to be a billionaire to do it. While cash contributions are always appreciated, there are other creative and flexible giving options that can benefit you and (INSERT ORGANIZATION NAME). Consider, for example, donating real estate, stocks, or other assets in return for a more favorable tax benefit. Many planned giving options offer generous tax benefits as well.

Whether it is naming (INSERT ORGANIZATION NAME) as the beneficiary of a retirement plan asset, life insurance policy or gifting other liquid or non-liquid assets, we encourage you to consult with your financial advisor to discuss the options.

The enclosed materials provide an overview of planned giving options. More information is also available on our website, (INSERT LINK). No matter what you choose to give, you will be honored through:

- (EXAMPLE BENEFIT #1: Recognition on our website)
- (EXAMPLE BENEFIT #2: Tributes in publications such as X, Y & Z)
- (EXAMPLE BENEFIT #3: Invitation to an annual Pie Society reception)

You need not be wealthy to leave a legacy. Ensure the sustainability of our organization in a way that makes your core values known to others. Generations to come will benefit from your gift. Your support of our mission will be long remembered and serve as an inspiration to others.

Warm regards,

(NAME)
(EXECUTIVE DIRECTOR)

SAMPLE LANGUAGE TEMPLATE

(To be used on NPO's website or other publications)

You do not need to be wealthy to leave a legacy. Make your core values known by making a planned gift to (INSERT ORG NAME) and joining Pie Society. Members of Pie Society are generous and forward thinking donors who will support our long-term success *and* be long remembered. Find out more about becoming a member of Pie Society here (INSERT LINK).

In addition to supporting our work through your generous cash donations, here are other ways you can contribute to the sustainability of (INSERT ORG MISSION) in the long term. Many of these options are a win-win for both you and our organization. We encourage you to consult with your financial advisor to discuss the tax implications of these options.

- **Bequests**

One of the easiest ways to help involves simply naming (INSERT ORG NAME) as a beneficiary in your will and/or living trust. A bequest may be for a particular dollar amount or percentage of your estate. Estate tax savings may be significant.

Sample Bequest Language:

Specific Bequest:

I give, devise and bequeath [insert dollar amount or item of property to be donated] to the [insert legal name of organization and Tax ID#] or its successor organization, a nonprofit corporation as described in section 170(c) of the Internal Revenue Code located at [insert organization's address].

Residuary Bequest:

I give, devise and bequeath [insert % amount] of all the rest, residue and remainder of my estate to the [insert legal name of organization and Tax ID#] , or its successor organization, a nonprofit corporation as described in section 170(c) of the Internal Revenue Code, located at [insert organization's address].

Sample Bequest to Endowment Fund

I give, devise and bequeath [insert dollar amount or state % of the residual estate] to the [insert fund name for your organization] at Waco Foundation Tax I.D. #74-6054628, a nonprofit organization as described in section 170(b) of the Internal Revenue Code located at 1227 N. Valley Mills Dr., Suite 235, Waco, Texas 76710.

- **Retirement Assets and/or Life Insurance Policy**
Often overlooked by donors is the option to name (INSERT ORG NAME) as a partial beneficiary of these assets to achieve philanthropic goals.
- **Life Income Gifts**
Life income gifts allow you to leave a gift in the care of (INSERT ORG NAME), while earning income for yourself during your lifetime. The two most popular life income gifts are charitable remainder trusts and charitable gift annuities.
- **Complex Gifts**
If you are a business owner, own real property or have any other type of complex asset, giving options exist that can both help (INSERT ORG NAME) and benefit your family financially.