



Nicole Pretre

serves as the President and Chief Executive Officer of Cedar Community and is a Credentialed Professional Gerontologist. She holds a Bachelor of Arts degree in Journalism and Communications from the University of Wisconsin-Madison, a Master of Science degree in Gerontology and Management of Aging Services from the University of Massachusetts-Boston, and a Certificate in Fundraising Management from the Indiana University Lilly School of Philanthropy.

Nicole serves on the board of directors for LeadingAge Wisconsin, and she is a steering committee member of Milwaukee Women inc. and the Ziegler Link Age Funds. An Emmy award-winning journalist, Nicole was honored as the 2020 Chief Marketing Officer of the year by the Milwaukee Business Journal.

Sarah Malchow

serves as Chief Administrative Officer of Cedar Community and is a Credentialed Certified Fund Raising Executive (CFRE). She holds a Bachelor's degree in Political Science and Public Administration from the University of Wisconsin, and additional certifications from the Indiana University Lilly School of Philanthropy. In 2019 her Philanthropy team that was awarded the Impact Award for Donor Stewardship and Engagement and in 2021 she was awarded the Scott M. Cutlip Professional Fundraiser Award from the Association of Fundraising Professionals Southeastern Wisconsin. She leads key revenue divisions including philanthropy, marketing, sales, and independent living. She has more than 20 years of non-profit leadership and fund development experience and most recently was successful in establishing a donor-directed endowed scholarship fund.

LEARNING OBJECTIVES



1
DATA
prospecting
and
segmentation



2
**INTERESTS
& VALUES**
where they
meet



3
STRATEGY
promote,
close, and
steward the
gift



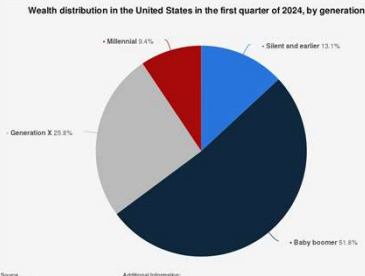
But first...why does planned giving matter?

the wealthiest generation in American history is aging

And they are moving in with you...

Source: Federal Reserve, 10/2023

Additional Information: Census Bureau, 10/2023



Generation	Percentage
Millennial	9.4%
Silent and earlier	13.1%
Generation X	25.6%
Baby boomer	51.9%



\$84 trillion is expected to pass from Baby Boomers to Generation X and Millennials through 2045.

- \$73 trillion will transfer to heirs
- **\$12 trillion to philanthropy**

Source: Bank of America Private Wealth Study 2022

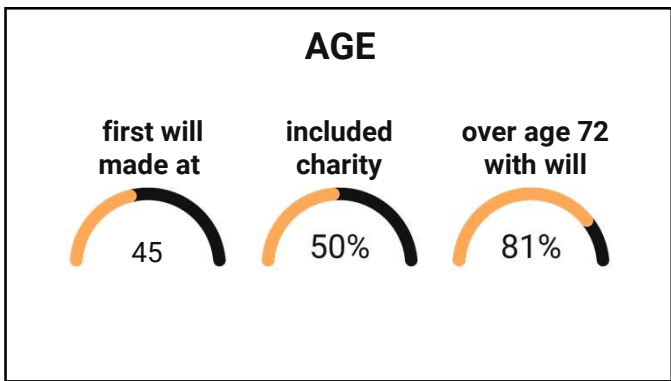
For many donors, their final gift is their greatest gift.

It is our privilege to help them make it.

1 Data informed prospecting and segmentation







ABILITY

History of giving?
How many years?

number
NOT size
matters



LINKAGE

How close are you?

- Years of residency
- Year of volunteerism
- Activities participation
- Family affiliations

MORE IS MORE



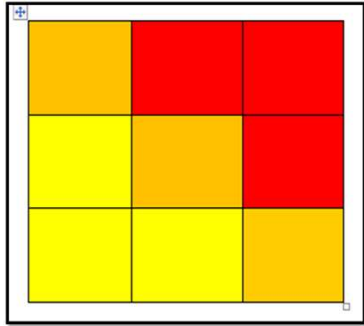
INTERESTS & VALUES



more on this in a moment...

If you can only track two things

- number of gifts
- length of residency



2

Interests and values:
connecting the heart



But what (or who) else do they care about?

- Veterans
- The environment
- Animals
- The underserved
- Their neighbors
- The arts
- Education



Now, how do you make the connection?

CASE STUDY: Education

The Carl Ziegler Endowed Education Scholarship



It started with Carl...

Prof. Carl Ziegler was a devoted and celebrated educator serving generations of students during his tenure at Indiana University-Bloomington. He embraced his role not only as educator, but as mentor, prolific letter-writer, and friend. With deep roots in the West Bend and Washington County communities, Carl carried on his family's legacy of philanthropic support for organizations serving our community. Carl was a faithful friend to and supporter of Cedar Community for many years, giving generous gifts of time, talent, treasure, and leadership. He made an indelible impact on Cedar Community and we are honored to celebrate and commemorate his memory and legacy...



Then his trustee had some ideas

The establishment of the Carl Ziegler Education Endowed Scholarship at Cedar Community. This educational fund has been established through his incredible generosity.

Now other retired educator residents are getting on board

One resident now legacy donor through entrance fee bequest to endowment and increased annual gifts as well for other purposes and projects. Other educators following suit...



what about you?





bequests



Simple bequest language can direct a specific portion of your total or specific estate assets either by dollar amount or percentage:

"I hereby give, devise and bequeath _____ % (or \$ _____) of my total estate, determined as of the date of my death, to Cedar Community, a registered nonprofit organization located at 5595 County Rd Z, West Bend, WI 53095, Federal Tax ID #39-0928211."

retirement assets & RMDs



Required Minimum Distributions (RMD) can be made **while your donor is still living**. If income is not needed, distributions can be made to your organization—helping your donor avoid the tax implications of increased income.

After death, residual assets from traditional pre-tax retirement accounts are best gifted to charities to avoid income tax burdens on heirs. Using a simple Beneficiary Designation Form, your donor can gift remaining assets to your non-profit.

stocks & bonds

Gifts during life can be a great way to donate appreciated stocks and can help donors avoid capital gains tax implications.

After death, these gifts can be made either as part of a bequest, via Payment on Death (POD) or Transfer on Death (TOD) declarations through your bank or securities brokerage.



life insurance

Policies your donors no longer have need for can be gifted through a simple **Beneficiary Designation Form**. Examples include policies from former employers, whole life policies, and more.

Additionally, savvy donors can **leverage dividends** from permanent life insurance policies, or purchase and gift of new policies to your non-profit. Consult your financial and tax advisors for laws in your state.





entrance fees

Residents who have refundable entrance fees may choose to add a beneficiary designation addendum to their contract should they wish. Designations can include other individuals, charities, or your organization.

Conversations about Efee refund bequests often open the door to other annual and planned giving conversations.

LEARNING OBJECTIVES

	<p>1</p> <p>DATA prospecting and segmentation</p>		<p>2</p> <p>INTERESTS & VALUES where they meet</p>		<p>3</p> <p>STRATEGY promote, close, and steward the gift</p>
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planned giving doesn't have to be hard. but you have to take the first step

