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10th Annual ADRP NYC Regional Conference

Friday, June 10, 2022

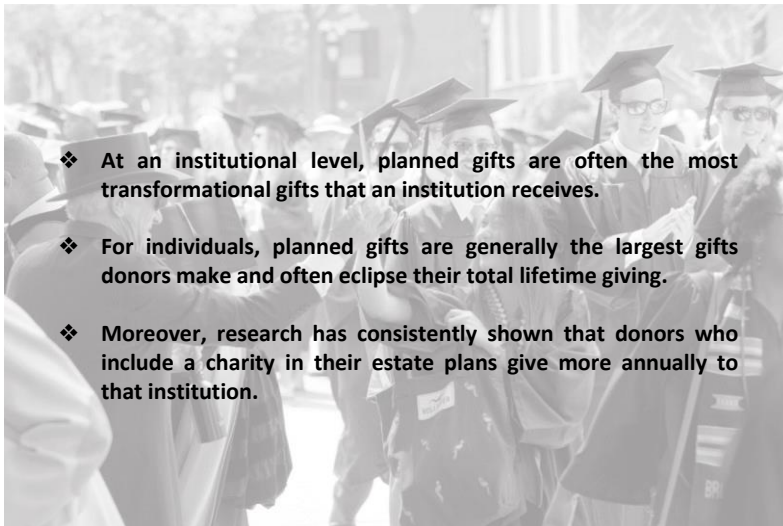
Donor Love for Life



Sierra Rosen,
Executive Director Planned Giving
&
Suzanne Bellanger,
Assistant Director Stewardship
Marketing

Brown University

The Case for Planned Giving



- ❖ At an institutional level, planned gifts are often the most transformational gifts that an institution receives.
- ❖ For individuals, planned gifts are generally the largest gifts donors make and often eclipse their total lifetime giving.
- ❖ Moreover, research has consistently shown that donors who include a charity in their estate plans give more annually to that institution.

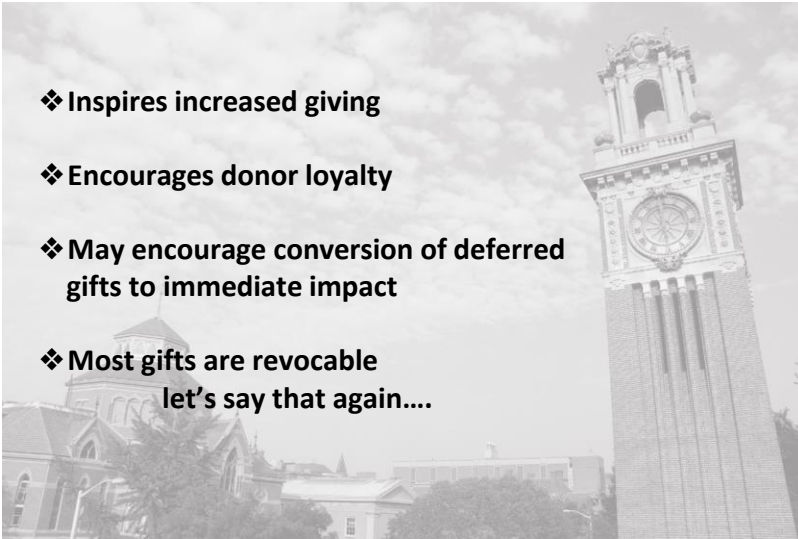
The Case for Planned Giving



Why Stewardship is Key



- ❖ Inspires increased giving
- ❖ Encourages donor loyalty
- ❖ May encourage conversion of deferred gifts to immediate impact
- ❖ Most gifts are revocable
let's say that again....



Why Stewardship is Key



Most gifts are revocable

Planned giving stewardship is critical in ensuring that donors maintain and even increase their provisions.

This is in part because the majority of planned gifts are revocable. In a recent study, the Sharpe Group* found that 71% of planned gifts were revocable.

* <https://sharpenet.com/give-take/irrevocable-gifts-always-key-success-planned-giving>

Brown University Planned Giving Stewardship: Demonstrating Impact, Showing Appreciation, Recognizing Support



❖ **Impact Report**

❖ **Virtual Events**

❖ **In Person Events**

❖ **Philanthropic Leaders**

❖ **Special invites to existing University events**

❖ **Donor Profiles**



COLLEGE HILL SOCIETY

Demonstrating Impact



SECURING A BRIGHT FUTURE FOR BROWN

Justin Piche-Claussen
I feel like I've had a lot of support from the University. The financial aid team is really helpful and they're always willing to talk to you about your options. They've helped me secure my financial future and I'm really grateful for that. The University's commitment to financial aid is really impressive and it's made a huge difference in my life. I'm excited to continue my education here and I'm grateful for the support I've received.

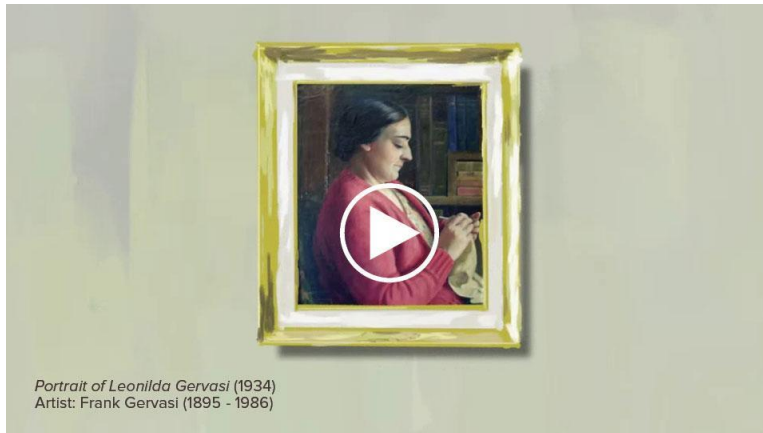
Anna Savaris-Watson '19
The financial aid department at Brown has been amazing. They've helped me secure my financial future and I'm really grateful for that. The University's commitment to financial aid is really impressive and it's made a huge difference in my life. I'm excited to continue my education here and I'm grateful for the support I've received.

Brown's goal has always been to attract the most talented students and help them realize their full potential. Though the financial situations of these students vary, the University is committed to meeting 50% of an undergraduate's demonstrated need, with scholarship packages averaging \$32,500.

In FY22, we budgeted \$103.8 million for need-based scholarships. We are also in the midst of building a \$100 million endowment for The Brown Promise in order to make permanent the allocation of funds from Brown undergraduate financial aid packages. The need is great, and financial aid will continue to be a top priority for the University.

Thank you for your longstanding support of Brown and your foresight in providing for the University through a generous gift.

Demonstrating Impact



Showing Appreciation

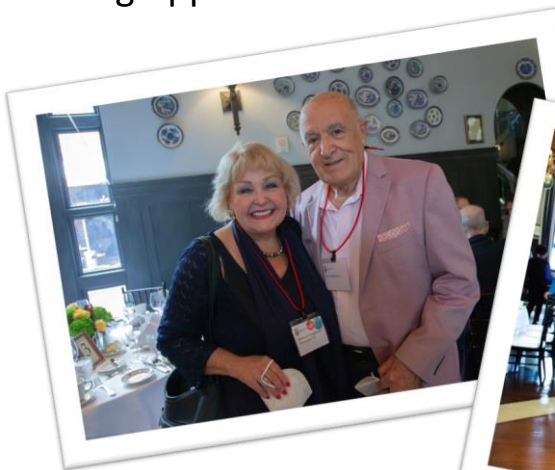


COLLEGE HILL SOCIETY

Recordings of College Hill Society Virtual Events

- | | |
|--|--|
| ▶ How the Brown University Library Strengthens Academic Excellence | ▶ The Power of a Charitable Remainder Trust for You <i>and</i> Brown |
| ▶ Charitable Gift Annuities: A Win-Win Opportunity | ▶ This Land Is Home: Centering Indigenous Voices in K-12 Outreach Education |
| ▶ Staying Connected through Tech | ▶ From Covid to Climate Change: A Conversation with Larry Larson |
| ▶ A Conversation on Digital Health with Dr. Megan Ranney | ▶ First Readings: Report of the Brown University Steering Committee on Slavery and Justice |

Showing Appreciation



College Hill Society Luncheon:
An opportunity to connect and celebrate

Showing Appreciation



CHS Members were entertained by The Higher Keys, Brown University's beloved all gender a cappella group



Recognizing Support



Inspiring Others

Recognizing Support



Inspiring Others

But how do you know what to offer?

Easy... just ask!!!



Donor surveys are a goldmine of information and help guarantee success.

When you know what's most important to your donors you can provide them with what they really want.



Measuring Success



- ❖ Increased Support for Current Use or Other Giving Priorities
- ❖ Growth of Planned Giving Pipeline
- ❖ Deeper Engagement
- ❖ Conversion

Measuring Success



Most importantly, it's the opportunity to create your own narrative.
It's YOUR story to tell....



Let's discuss!



What's your story?



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Questions



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