

# Planned giving and bequests 101:

What is planned giving,  
how do you organise it, and manage it?

**Webinar:**  
**14 July 2016**



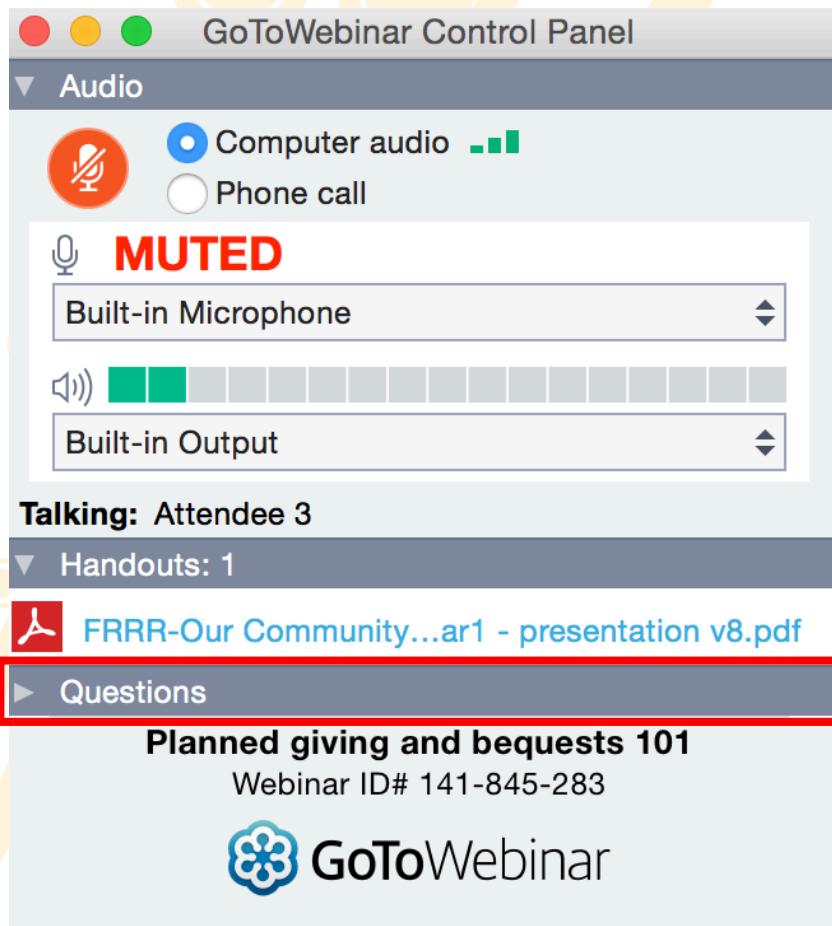
# Today's agenda

---

- Webinar Tips
- The ABC of planned giving and bequests:  
Who, what, why, when, where and how
- Community organisations case studies
- Key Takeaways
- Q&A

# Get Involved!

## Using the Webinar Control Panel



Open and hide the control panel by clicking on the **orange** arrow

Change your audio:

- Choose "Mic & Speakers" to use VoIP (your computer speakers)
- Choose "Telephone" and dial using the information provided
- Please mute yourself

Submit questions and comments via the Questions panel – ask any time

**Please Note:**

Today's presentation is being recorded.

# Your presenters

- **Natalie Egleton** - FRRR CEO
- **Patrick Moriarty** - Director of Training and Development Our Community
- **Wendy Brooks** - MD and Founder of Wendy Brooks Consulting

@negleton

@8GlenSt

@FRRR\_Oz

@OurCommunityAU

#RuralFunding



*Natalie Egleton*



*Patrick Moriarty*



*Wendy Brooks*



# What is planned giving?

## Gifts while living

- tax deductible
  - Donations - one off, monthly
  - Workplace Giving
  - In kind support/volunteering

## Gifts after death

- not tax deductible
  - Bequests / Gifts in Wills: gifts made in the Will
  - Gifts in Memory: gifts given by a person's family or executor, as a legacy.

## Australian Rural Leadership Foundation



# How are bequests made?

- Encourage your donors to speak with a solicitor, as many ways to make a bequest
  - support the general work of a specific organisation
  - support a specific program of an organisation
  - Support a particular demographic or region
- More general the instructions in the will, the more likely that the intentions of the donor will be able to be followed.
- If specific, the will should direct the gift to a similar organisation or cause, in the event of the organisation closing down

# Why do people make Gifts in their Will?

*They will only give if they believe in your cause or in the organisation, and have the desire to help those in need into the future.*



- Connected to a place, a building, or an organisation that they have benefited from
- A life-changing experience connected to a cause
- Family tradition or commitment
- See a longer term need, opportunity or priority
- See others doing it



# What does this mean for rural and regional communities?

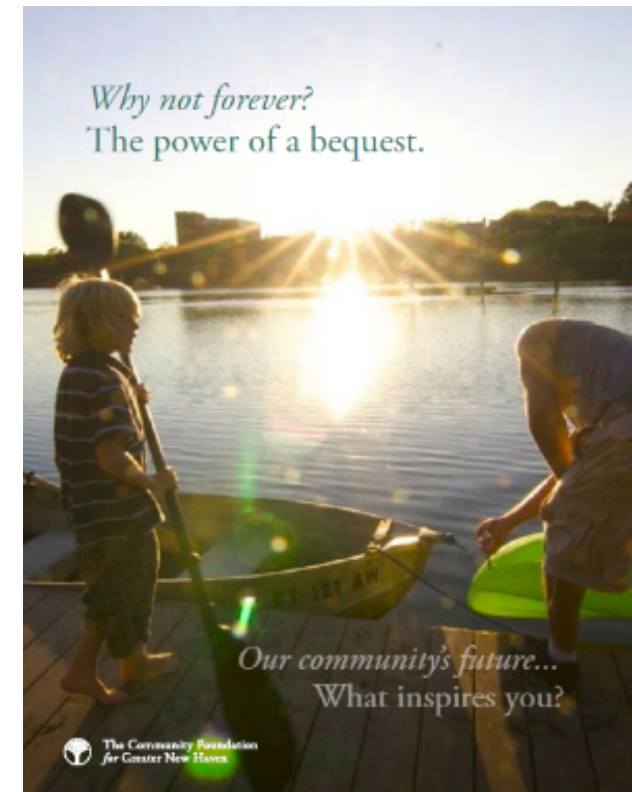
- People give with their heads and hearts, and support people and places that they feel connected with
- Locals will support local needs - *if they know you want that kind of support*
- Bequests may suit your group if you have:
  1. **Capacity** - appropriate skills, resources?
  2. **Sustainability** - organisation lifetime? A long term need or priority to be addressed?
  3. **Strong support base** - connections, well supported?
  4. **Reputation** - ethical, transparent, trusted?





# Who would give to your community organisation?

- Those who know & have supported you most likely to give
- So, who's involved, connected?
  - Board members, volunteers, staff, both current and former), lapsed members, donors
- Some FLAGS to consider:
  - **F**requency of gifts
  - **L**ength of time as a member (three years or more minimum)
  - **A**ge (65 and over)
  - **G**ender (majority of bequests to charities are women who never married or who outlived their husbands)



# What could they give?

- Estate - all or part
- Money - set amount
- Property
- Anything of worth - art work, shares, jewellery, rare collections etc

*Note, there are some things that require special consideration legally, so it's important that your organisation and the bequestor each has a solicitor*

## \$250,000 BEQUEST BRINGS PUBLIC ART TO RURAL WESTERN AUSTRALIA



Damien Butler, Kaleidoscope (impression).

27 March 2013 | Bridgetown, as rural township approximately 270 kilometres south of Perth, will soon be receiving a large scale public artwork titled Kaleidoscope (pictured above) as the first part of a \$250,000 bequest from local Dr Henry Schapper.

Dr Schapper was a renowned academic and author, who entrusted WA's peak body for visual artists, Artsource, to commission a public artwork as a gift to his beloved town.

# What kinds of needs or priorities are suited to bequests?



- Local education development opportunities
- Restoration and maintenance of buildings and sites of significance
- Historical societies to build and care for collections
- Local tourism development initiatives

# What do you need to start a bequest program?

- Have a clear view of your supporters and prospects
- Clear communication is critical
  - An info pack - website, flyer, key messages, FAQs
  - Why should they leave a gift in will? What good will it do?
  - Engagement and promotion plan (face to face, online etc)
- Make it easy for the instructing solicitor
  - Contact local solicitors to let them know
  - Enlist the support of a solicitor in case of
  - Contested estates (negotiated settlements)
  - Provide: Street address; ABN; Fund / Organisation name; DGR status
- Gift in Will “Group”

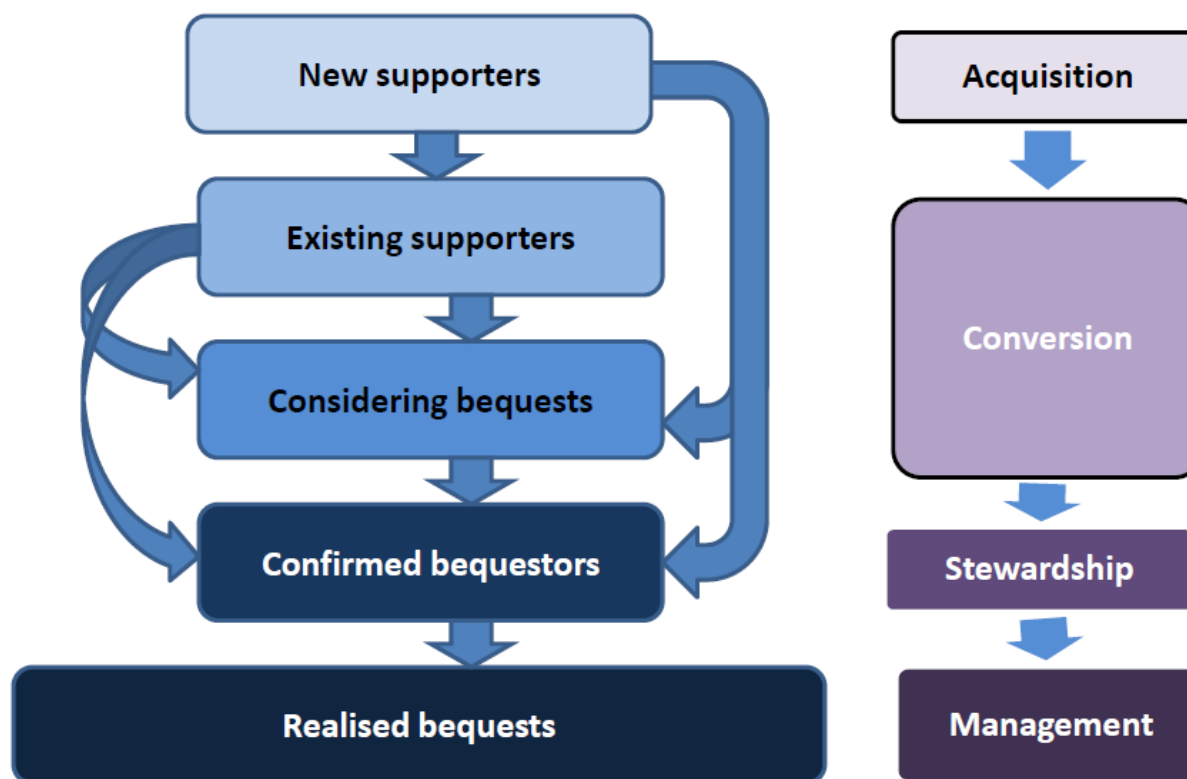
**BUILDING  
TODAY  
FOR TOMORROW**



*How a Bequest  
can ensure  
the future of  
the Diocese of Willochra*



# Implementing best practice 'Gifts in Wills' programs



# Castlemaine State Festival - “Planting the seed”

## Approach:

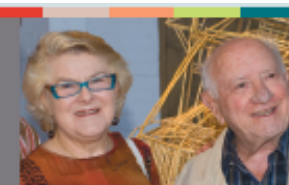
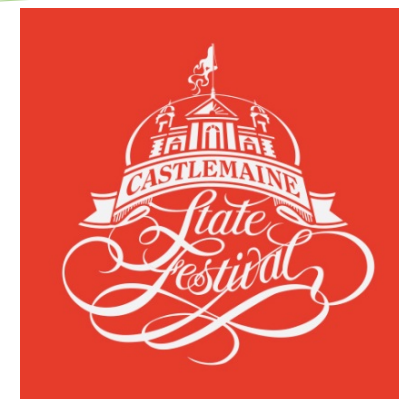
- Bequest program named in honour of the festival founders
- Bequest program launched at 2015 Festival - themed celebration of ‘*Before and Beyond*’
- Continual communication to supporter community

## Results:

- Three notified bequestors
- Two supporters seeking more information

## Success factors:

- Strong founder and patron support
- Dedicated Patron Program Manager
- Regular conversations about the program



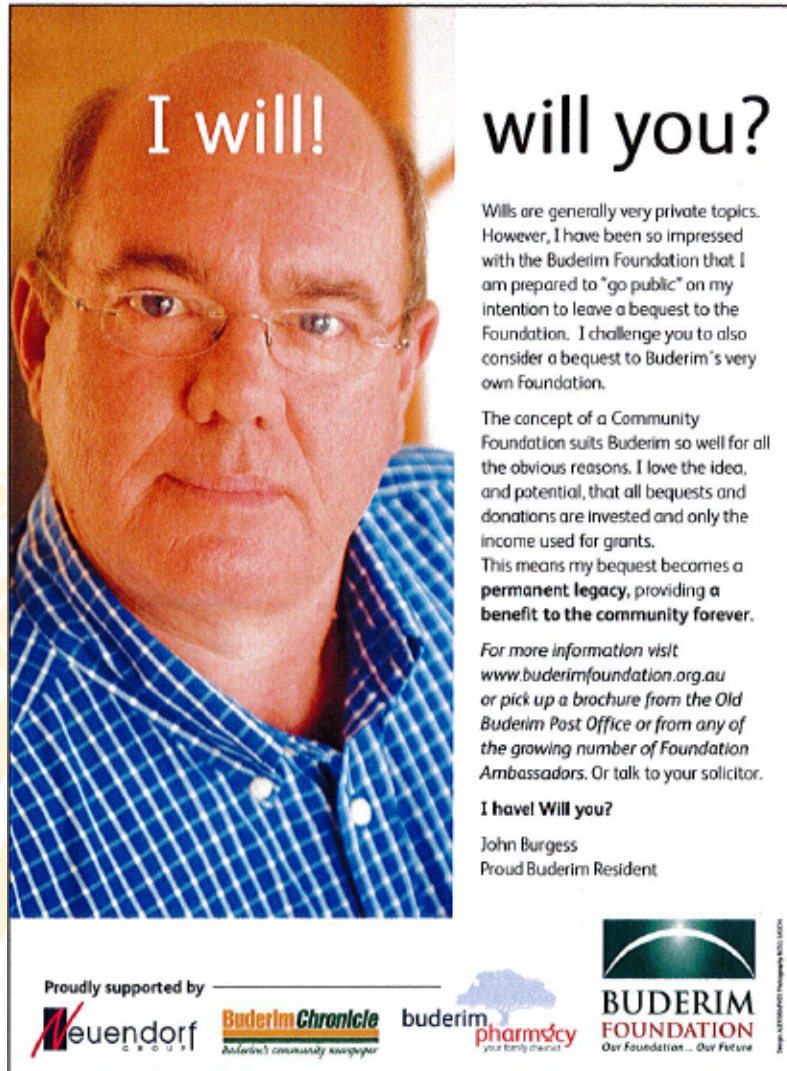
Berek and Marysia Segan,  
Festival founders

Musician and culture lover  
Berek Segan migrated to Australia from Poland in the late 1930s to begin a new life. A business investment brought him to Castlemaine where he fell in love with the town, its streetscapes, history and people, many of whom were artists.

In 1976, with the blessing of his wonderful wife Marysia, Berek endowed Castlemaine with a biennial arts festival. The Castlemaine State Festival has enabled access to some of the finest Australian and international musicians, artists, performers and dancers in a regional setting.

In 2015 Berek turns 99. He still plays his beloved violin and is looking forward to his 20th Festival in Castlemaine.

# Buderim Foundation is doing it well



**I will!**

**will you?**

Wills are generally very private topics. However, I have been so impressed with the Buderim Foundation that I am prepared to "go public" on my intention to leave a bequest to the Foundation. I challenge you to also consider a bequest to Buderim's very own Foundation.





The concept of a Community Foundation suits Buderim so well for all the obvious reasons. I love the idea, and potential, that all bequests and donations are invested and only the income used for grants. This means my bequest becomes a **permanent legacy**, providing a **benefit to the community forever**.

For more information visit [www.buderimfoundation.org.au](http://www.buderimfoundation.org.au) or pick up a brochure from the Old Buderim Post Office or from any of the growing number of Foundation Ambassadors. Or talk to your solicitor.

**I have! Will you?**

John Burgess  
Proud Buderim Resident

Proudly supported by

## BF approach:

- Pragmatic five year strategy
- Strong board and committee structure
- Professional marketing
- Strong support from local businesses, lawyers and Financial Planners
- Community partnerships

## BF success factors:

- Regular and highly personalised communication, preferably one-on-one, same BF committee member
- Recognition of gifts
- Seek regular community feedback
- Provide clear evidence of community impact that BF is making



# Recognising a bequest

- **Give naming rights** - name a program, project or legacy (warning: not forever)
- **Endowment Fund** - why, how, what does it achieve that giving now doesn't
- **Stewardship** - engagement if pledged
- **Through communication:**
  - Public acknowledgement e.g. Buderim Foundation “Gifts In Memory”
  - Private acknowledgement organised through family members



# It is a tricky subject...

You're dealing with death and money, both very sensitive topics!

- Make sure your group is ready to go down this path
- Do your research
- Have a clear plan - including training



Donations

**LEAVING A BEQUEST**  
TO SOMERVILLE COMMUNITY SERVICES

*Leaving a bequest to  
Somerville can make  
a lifetime of difference  
to Territorians*

Somerville Community Services Inc.  
PO Box 42644, Casuarina, NT, 0811  
Phone: (08) 8920 4100  
Fax: (08) 8920 4101  
Email: [scs@somerville.org.au](mailto:scs@somerville.org.au)  
Website: [www.somerville.org.au](http://www.somerville.org.au)

**LEAVING A  
LASTING LEGACY**

LORD MAYOR'S  
CHARITABLE  
FOUNDATION

**GIFTS IN WILLS**

## Bequest Information

**Cottage  
by the Sea  
Queenscliff**

*... helping children and families in need*

*"We can make a difference to  
children's lives with your help."*

*Gather Hermon*

# Watch-outs for fundraisers

- Contested Wills
- Managing expectations
- Stewardship of original donor intent
- Consistency - resources, message
- Don't give wording for Wills - always recommend that the donors give instructions to their solicitors



## Be patient - Gifts in Wills fundraising has a lag time of approximately five years.

*Organisations can and must act now to invest in creating the most effective bequest fundraising programs possible and take full advantage of the effects of an ageing Australian population, a large and elderly pool of supporters and the largest intergenerational transfer of wealth the world has even seen that is anticipated to occur over the next 25 years.*

Wendy Brooks

# Recapping the Lessons

- **Skilled and resourced** - gifts in wills works for rural groups but you need to be prepared
- **Plant the seed** - remind your community members that they can support local groups via gifts in wills.
- **FLAG** - when considering supporters
- ■ **Tread carefully** - broach the subject considerately and knowledgably, and get the right legal advice
- **Communication** - clear and persistent
- **Partners** - solicitors, local businesses, FRRR
- **Recognise** - consider the options for the donors



# Additional resources

- [www.frrr.org.au](http://www.frrr.org.au)
- [www.OurCommunity.com.au](http://www.OurCommunity.com.au)
- [www.wendybrooksconsulting.com.au](http://www.wendybrooksconsulting.com.au)
- [www.fundingcentre.com.au/help/wills-bequests-basics](http://www.fundingcentre.com.au/help/wills-bequests-basics)
- [www.includeacharity.com.au](http://www.includeacharity.com.au)
- [www.buderimfoundation.org.au](http://www.buderimfoundation.org.au)
- Search:  
[Somerville Wills and Bequests Guide](#)
- Things to download from panel on right:
  - Nine steps to 'Gifts in Wills' success
  - Today's presentation



An aerial photograph of a rural landscape. In the foreground, there are patches of green and yellow fields, some with small clusters of trees. A road or path runs through the middle ground. In the background, there are rolling hills and mountains under a clear blue sky. The word "Questions?" is written in a large, white, cursive font across the upper part of the image.

*Questions?*



# Save the date:

## WEBINAR 2: 1pm, 27 July

**Sponsorship 101** - what are the different sponsorship options in rural and regional Australia and how do you prepare a business case to bring in funding, then manage these important relationships?

### Panel:

- **Natalie Egleton, CEO FRRR**
- **Patrick Moriarty, Director of Training and Development Our Community**
- **Wendy Brooks, MD and Founder of Wendy Brooks Consulting**

# Thank you for joining us

*Please complete the short survey that pops up as you leave this webinar.*

*Your feedback will help make the next webinar even better ...*

