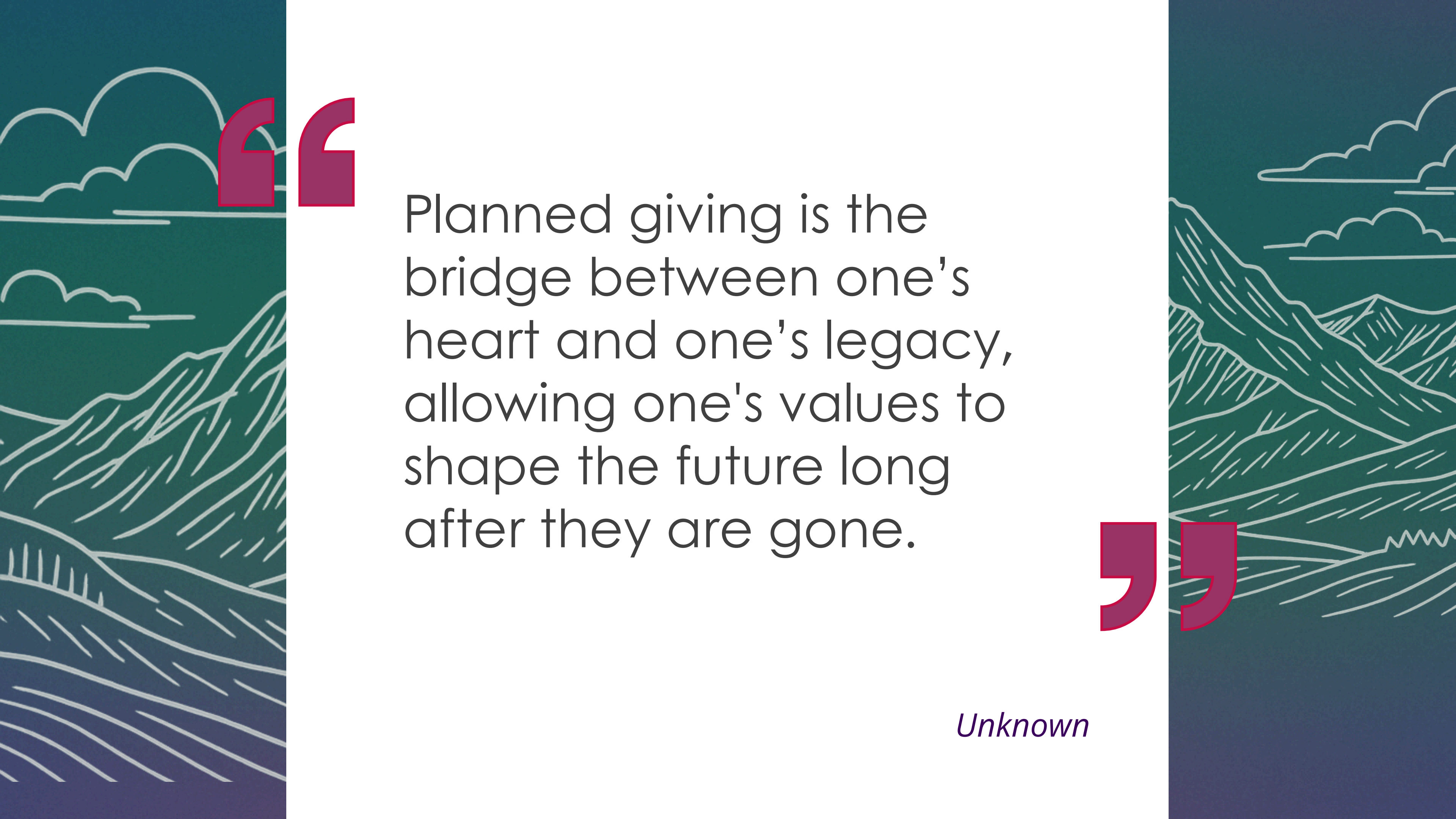




Case Study: AdventHealth West Florida Legacy Giving





Planned giving is the bridge between one's heart and one's legacy, allowing one's values to shape the future long after they are gone.

Unknown

Today's speakers



Megan Miller
Executive Director
Planned Giving
AdventHealth West Florida



Jeff Grandy
Vice President
Catapult Fundraising





Let's find out who's in the room with us today.



What is your experience with Legacy Giving?

Today's agenda



- Why is there urgency and opportunity for legacy giving now
- How AdventHealth West Florida Foundation approached Legacy Giving
- What to say during Legacy Giving Conversations

Why Legacy Giving Matters

- 33% of Americans are willing to consider a charitable bequest
- Average age of first bequest designation is 45-50
- The younger you reach a prospect, the better:
You'll increase annual giving by 6x-7x
- Once a nonprofit is in the will, it is likely to remain by 75%
- Individuals over the age of 55 control 80% of wealth in the USA
- 61% of households own equities in the USA
- More and more donors are using IRA and DAF for charitable giving

- **Sources:** FreeWill 2022 Planned Giving Report, Giving USA, Donor-Centered Planned Gift Marketing, Source: LinkedIn News 2024, Money.com, Rosenberg Research

PLANNED GIVING DONOR CHARACTERISTICS

All ages
(~68 / 53*)

Average
Americans

Marital Status

Gender

Without kids

Majority of gifts are
bequests and
beneficiaries

Has pets

Religious

Health

Volunteerism

The background features a dark teal upper half with white line-art clouds. The lower half is a dark purple-blue with white line-art mountains and a jagged horizon line. A white rectangular box is centered horizontally, containing the word "LOYALTY" in green capital letters.

LOYALTY

WHO WE ARE:



Catapult is a trusted full-service fundraising consulting firm. We have helped countless non-profits launch donor relationships and maximize their revenue while minimizing their investment!

WHAT WE DO:



**CAPITAL CAMPAIGN
CONSULTING**



**CAPACITY
BUILDING**



**MAJOR GIFT
INITIATIVES**



PROSPECT RESEARCH



**PLANNED GIVING
PROGRAMS**



**MID-LEVEL DONOR
CALLING PROGRAMS**



**ANNUAL FUND
CALLING**



**CAMPAIGN WRAP-
UP CALLING**



**PLANNED GIVING -
LEGACY CALL
PROGRAMS**



Overview of AdventHealth



Number of Hospitals

Hospital Acquisitions

Geographic Area

Staff & Resources



Partnership Goals

- Engaging donors/staff/grateful patients
- Need to uncover unknown legacy gifts
- Staff training of new fundraisers

AdventHealth's Reality

- Legacy Giving limited outreach
- Limited staff bandwidth
- Database issues - demographics
- No RMD/QCD prospect pipeline

Why AdventHealth Partnered with Catapult

- Begin the conversation
- Thank Loyal Donors
- Identify Legacy Giving Interest
- Explore Legacy Gift Options
- Confirm & Quantify Legacy Gifts
- Quality reputation of calling team

Successful Steps

Prospect Screening and List Review

Legacy Giving Case for Support

Multi-Channel Messaging

- **Social & Website**
- **E-Newsletter**
- **Magazine**
- **Events**
- **Testimonials**



Successful Steps

Pre-call Materials

- Letter or Email
- Digital Voicemail
- Caller ID & Area Code

Stewardship Call

- Qualification
- Volunteer



Successful Steps

Gift Planning Calls

- Set a goal of 5 new calls by 10am, each day
- 20% of qualification calls will become a gift planning call
- Follow-up calls with those expressing interest
- Confirm the gift within 2-6 conversations
- 25% already have your organization in their will
- Legacy donors give 6-7x more to the annual fund
- Remember not everyone is ready on your timeline - They are ready on their timeline



Successful Steps

Confirmation

- **Confirming intent to make a gift**
- **Collecting gift intention form**
- **Thank You**

Recognition

- **Legacy Society benefits**

Stewardship Reporting

- **Evaluation**
- **Outcomes**





**SCAN
to Request
Presentation, Talking
Points & Scenarios**

The Catapult Difference

- Collaborative Partnership
- Customized Segmentation
- Reach and Engagement
- Extension of the team
- Document Donor Outcomes
- Letter Writing
- Identify Interest
- Build Relationships
- Donor Stewardship

Legacy Call Story #1

- Roger 84 yo
- Former Foundation board Member
- \$10,000 annual gift for 15 years
- Planned gift intention mentioned in the past
- Stewardship and a strong relationship with local FR
- He was excited to be our Secret Shopper
- Hoping to learn more about his plans
- He confirmed PG on Legacy call

Legacy Call Story #2

- Veronica – 77 yo
- Originally from Upstate NY
- Husband was patient at other AH hospital
- Construction tour early 2024
- \$25,000 gift EOY 2024
- Veronica in-house 2x in 2025
- Lots of cultivation thru lunches, calls & gifts
- Planned Gift never discussed
- Legacy call revealed PG intention

Legacy Call Story #3

- Wendy 69 yo
- Giving increased upon his passing
- Hospital Chaplain's widow
- Keeping husband's legacy
- Husband was retired Church alive pastor
- Verbalized PG to staff
- \$1,000 avg annual donors since 1990
- Hoping to document her estate gift with Legacy calls
- First AH hospital in West Florida

Legacy Call Story #4

- Ann 61 yo
- 30-year employee
- AH employee since acquisition 15 years ago
- Small annual gifts - employee giving campaign
- Not known to Foundation staff
- Employees with giving history were included in Legacy calls
- Revealed estate gift to Legacy caller
- Ann will be stewarded with all other Planned Giving donors

Types of Donor Conversations

Thank You

Identify Interest

Explore Gift Options

Confirm Intention

Stewardship





What's Important to your Donor

Take Time to get to know them

Build a trusting relationship

Solve Problems

Provide Gifting Strategies

Legacy Giving Best Practices

- Top Partnership Insight
- Pitfalls to Avoid
- Remember

Thank You




Advent Health
Foundation | West Florida



Megan Miller
Executive Director
Planned Giving
AdventHealth West Florida
megan.miller@adventhealth.com
248-217-9873



Jeff Grandy
Vice President
Catapult Fundraising
jeffg@Catapultfr.com
702-538-3292



 **atapult**
Fundraising