Helping Nonprofits Pursue Their Mission

GENEROUSLY

FAITHWARD
ADVISORS

A Profitable, Professional Partnership

Faithward Advisors is here for you, guiding your organization into the most potential while honoring the integrity of your nonprofit's mission. With effective stewardship strategies, our professional advisors provide you with a front row seat to watch your planned giving efforts grow! We begin by evaluating your existing framework to see what works and what can be augmented. Then, we launch our marketing strategies and inspiring educational opportunities that keep your nonprofit fresh in the minds of donors who are considering planned gifts and legacy planning. Ultimately, we continue to work alongside you, so that you're able to focus on your mission, and we're able to help keep it growing!

Personalizing Your Plan

Your nonprofit is uniquely designed. We get that! We listen to you and strive to meet the specific needs of your donors and your planned giving program.

Our Approach is:

- **RELATIONAL**
  We meet with your key decision makers, including Board of Directors and Executive Staff, forming a cooperative relationship, as we review our processes and services.
- **MEASURABLE**
  We use our Planned Giving Scorecard to assess your strengths and challenges. Additionally, we will present recommendations to help supercharge your planned giving efforts.
- **SUCCESSFUL**
  Our customized annual action plan will not only guide you toward maximizing your planned gift potential, but will always reflect your values and mission, helping you achieve your goals.

Planned Giving

OFFERINGS

PLANNED GIVING SCORECARD

- Comprehensive online survey for organizational directors and staff
- Report that ascertains board knowledge and focus
- Benchmark your nonprofit against national Planned Giving Scorecard results
- Prioritize steps and develop an action plan

CHARITABLE GIFT ANNUITIES

- Creation, review and implementation of CGA program
- State-specific tax reporting
- Strategic analysis of reserve requirements

MARKETING AND EDUCATION PROGRAM

- Strategic marketing plan review and goal development
- Creative educational presentations for donors, volunteers, board of directors and staff
- Marketing program tactics to engage all audiences, including videos, receipt stuffers, newsletter articles, email blasts, brochures, and web content

ASSET MANAGEMENT SERVICES

- Review and/or creation of investment policy
- Organizational/individual portfolio review and design
- Investment management team knowledge and report preparation
- Estate planning and bequest consultations

ENDOWMENT CAMPAIGN PROGRAM

- Partner with you and your endowment campaign team
- Offer professional guidance for endowment growth potential and ways to give appreciated assets
- Provide a referral for the development of your case for support brochure
- Investment and management of Endowment funds

EMPLOYEE AND EXECUTIVE BENEFIT CONSULTATION

- 401(k) and 403(b) retirement plan management
- Employee education and private consultations
- Audit to ensure nonprofit ERISA compliance

DONOR EVENT PRESENCE

- Attendance at donor events
- Brief, creative planned giving presentation during banquets and events
- Creative themes, invitations, videos, presentations, and more offered as part of our marketing and education program

DONOR ESTATE AND CHARITABLE PLAN DESIGN

- Energize key donors to Do More for the nonprofit
- Customized donor wealth diagnostic report
- Donor goal achievement plan utilizing state-of-the-art software and planning techniques
- Reduction of taxation and maximization of charitable giving solidified

A Sustainable WATERFALL OF GENEROSITY

An unprecedented intergenerational transfer of wealth in the United States is happening in our midst! Nearly $84 trillion will change hands through the next several decades, unhindered by economic downturns and market volatility.* This is an incredible opportunity to maximize your organization's impact! By capitalizing on planned giving opportunities, which focus on the 90% of donor wealth that is NOT cash, you are building sustainability that extends your mission support beyond supporters who write checks against their cash holdings.

** Source: Cerulli Associates*

Cash is Just the BEGINNING

If your organization puts 90% of your fundraising efforts toward the 10% of donor wealth that is cash, and only a small effort toward the remaining 90%, is your sustainability plan out of balance?

YOU ARE NOT ALONE. Many nonprofits focus primarily on cash, but may be receiving a meager fraction of what is available, because they don't have a partner to make planned giving marketing and education a priority. Appreciated property, like real estate, stocks, insurance, and other investment accounts comprise over 90% of donor wealth and may often result in greater tax benefits for the donor when gifted strategically to an organization like yours.*

CASH IS NOT KING FOR NONPROFITS. IT'S MERELY THE TIP OF THE ICEBERG!

Let us help you go deeper. Our trained professionals are here to guide you on your planned giving journey.

**Source: A Golden Age of Philanthropy Still Beckons: National Wealth Transfer and Potential for Philanthropy, by The Center on Wealth & Philanthropy at Boston College.*

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