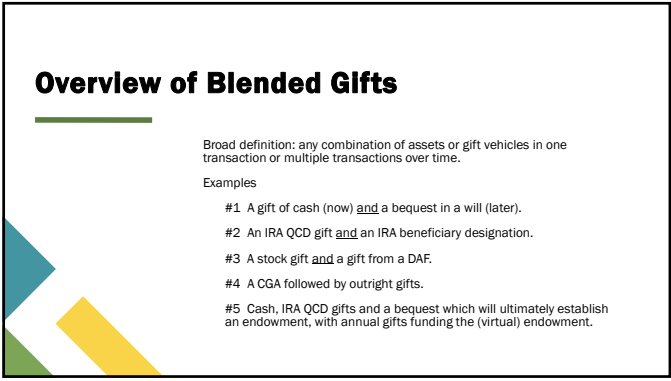




1



2



3

Benefits

- Achieve donor's goals (personalized)
- Achieve organization's goals (funds now and later)
- Larger impact possible
- Can enhance or create a legacy
- Possible naming opportunity

4

Assets

Cash
 Stocks
 Bonds
 Cryptocurrencies
 Bank accounts
 Investment accounts
 Art and collectibles (coins, etc.)


Businesses
 –Corporations, partnerships, LLCs/LLPs
 Real estate
 Patents & copyrights
 IRAs and retirement plans
 Annuities
 Life Insurance

5

Gift vehicles

Wills/trusts
 Beneficiary designations: IRA,
 retirement plan & life insurance
 Bank & investment accounts
 Charitable gift annuity
 Charitable remainder trust
 Charitable lead trust
 Pooled income fund
 Donor advised fund
 Private foundation

6




Describe a blended gift you have received.

- What assets or options were used?
- Who did you collaborate with?
- What did the donor achieve?
- How was the gift counted/booked?
- How was "credit" allocated for the gift?

Breakout session #1

7

Regroup & report



8

#1 Sue is a long-time donor who has an endowed fund. You would like to ask Sue to make a campaign gift. Sue owns these assets:

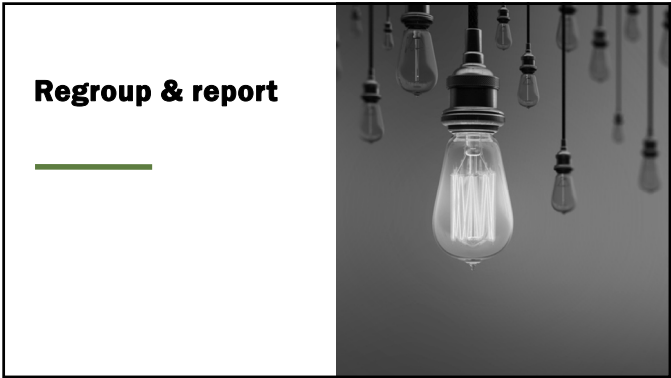
- a. A car, some art, coins
- b. A large IRA
- c. A small life insurance policy
- d. A primary home and a vacation home
- e. A bank account owned jointly with a niece

#2 Sue and John have made a few gifts including a recent gift of \$50,000 in honor of John's father, an alumnus. You would like to ask Sue and John to create a \$500,000 endowed fund. They own these assets:

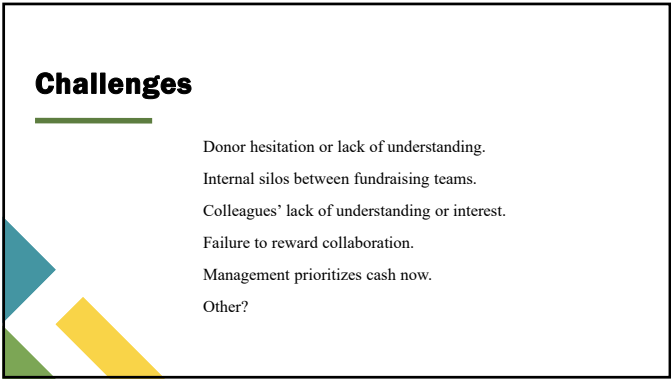
- a. Two cars and a boat
- b. An IRA (Sue) and a 401k (John)
- c. A life insurance policy on each spouse
- d. A home plus Sue co-owns a home in France
- e. Joint bank and investment accounts

Breakout session #2 (choose one)

9



10



11



12

Final Thoughts

Blended gifts benefit both the donor and the organization.

Blended gifts are tailored to the donor's assets and goals.

Blended gifts can enhance or create a legacy,

*****Blended gifts empower donors to maximize their impact through strategic giving.*****

13

Thank you

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14
