

LIFESTYLE INCOME STRATEGIES
PROVIDING INCOME STRATEGIES FOR YOUR LIFESTYLE

CREATE EXCITEMENT WITHIN YOUR MAJOR DONOR BASE

KEY ELEMENTS

AN OPPORTUNITY TO APPROACH MAJOR DONORS AND NOT ASK THEM FOR A DIME. DONORS CAN CREATE LIFETIME AND POST LIFE DONATIONS WITHOUT AFFECTING CURRENT GIFTING

The charity is no longer in the awkward position of waiting for a Donor to pass in order to collect designated gifts or endowment funds. This strategy creates an income stream during the life of the donor and a lump sum donation from their post life Estate.

Our firm partners with highly respected major financial institutions to create individual programs for Donors. It has a 50+ history of completely ethical and honorable proven methods of raising millions of dollars in endowments or other future funding needs. These strategies are truly a win-win for every party utilizing this approach to gifting.

FOUNDATIONS & CHARITIES

- The funds raised through this strategy can be used for any purposed deemed appropriate by the governing body. Some examples include:
- Continue and increase current philanthropic and legacy goals
- Increase annual giving income or create end of life gift
- Expand the organization's mission and the reach of services / programs
- Pay the ongoing expenses of personnel, offices, equipment, and research
- Expand the awareness of the mission through radio, video, or television
- Major donor base will appreciate that no one is asking for more of their money

POTENTIAL DONOR BENEFITS

This program can be used to create an opportunity for Donors or a group of Donors to be recognized in the local community or even on a national platform. Most Donors enjoy being acknowledged for their contributions and what better way than to create or maintain a project solely based on the ongoing gifts from a major Donor(s).

Using this approach affords the organization the ability to name the project after the Donor or the Donor's designated fund name and create an eternal legacy. Others may be inspired by actions and donations of key Donors to create their own legacy as well.