



# The Dynamic Duo

## Estate Planning and Planned Giving: What Fundraisers Should Know About the Pair

Presented by:  
Aquanetta Betts, JD, CAP®, AEP®, CFRE  
Director of Planned Giving

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# AGENDA



- **The Dynamic Duo:**
  - Estate Planning
  - Planned Giving
- Motivations and Strategies
- Integrating Estate Planning & Planned Giving
- Case Studies
- Q&A



# Disclaimer



The information presented herein is not a comprehensive analysis of the topic presented, and the viewer should consult tax and legal advisors to understand all of the ramifications of the topics discussed. This presentation is for informational purposes only.

Please be advised that any information provided in this presentation should not be construed by any person as legal, tax, or accounting advice.

# Dynamic Duos!

What Iconic Pairs Come to Mind?

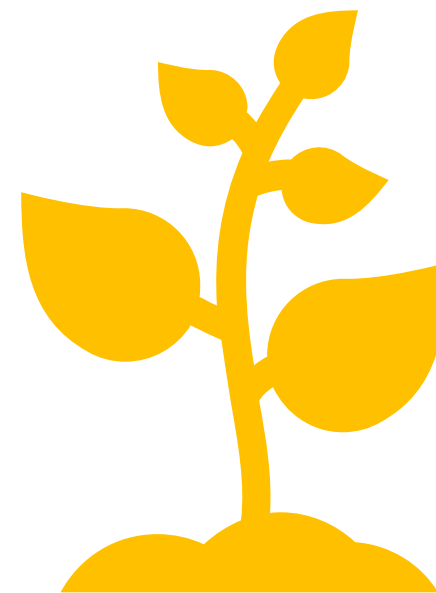
- Peanut Butter and Jelly
- Batman and Robin
- *Estate Planning and Planned Giving*



# What is Estate Planning

Whereas estate planning involves many considerations:

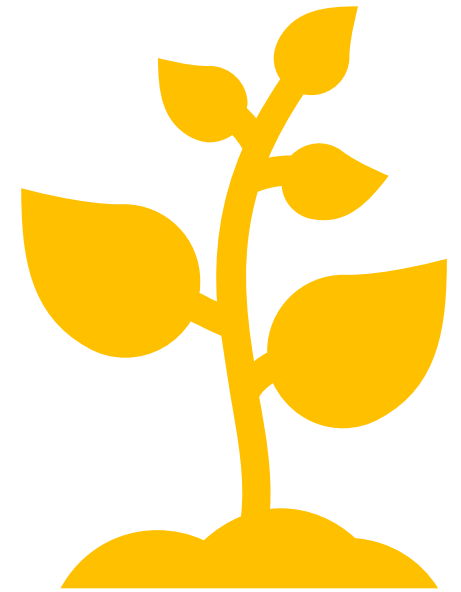
- including safekeeping of important documents, documentation of assets,
- operation of law in the various States,
- preparation of legal instruments,
- insurance,
- availability of trust arrangements,
- charitable giving,
- inter vivos care of the benefactor, and other important factors;...



# What is Estate Planning, *Cont'd*

Whereas estate planning encourages timely decisions about:

- the method of holding title to certain assets,
- the designation of beneficiaries, and
- the possible transfer of assets during the life of the benefactor;...



Source: 03/20/2025, House Resolution 1499, <https://www.naepc.org/assets/national/files/HR1499.pdf>

# Estate Planning Basics

**Will**: bequests, guardian for minor children, personal representative/executor  
(*Trust, if needed*)

**Power of Attorney**: Appoint Agent to handle financial/business matters

**Advance Medical Directive**: Appoint Health Care Agent to handle medical matters; Living Will – treatment preferences

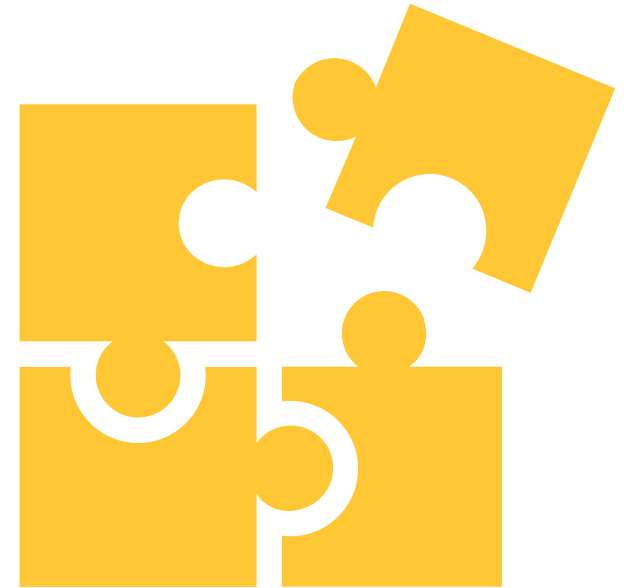


# Trivia

## Question:

What do Picasso, Jimi Hendrix, Abraham Lincoln, and Sonny Bono have in common?

**You're thinking, *not much?***



# Trivia Answer

## Question:

What do Picasso, Jimi Hendrix, Abraham Lincoln, and Sonny Bono have in common?

## *Answer:*

They all died **intestate** (without having a will).



# What is in an Estate

## Tangible Assets:

- House
- Real Estate
- Automobiles
- Jewelry
- Household Possessions
- Collections, etc.
- Other Non-Cash Assets



# What is in an Estate

## Intangible Assets:

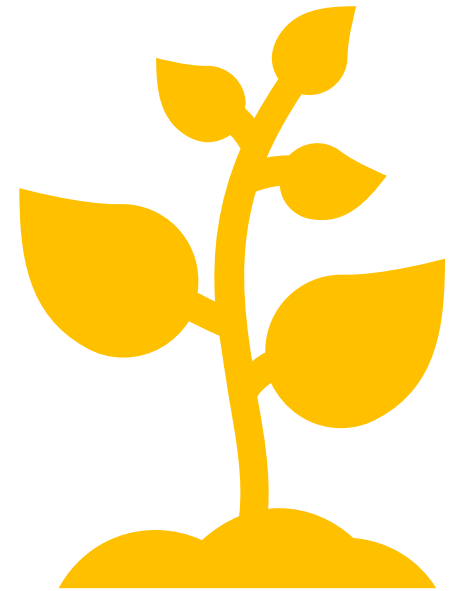
- Bank Accounts
- Annuities
- Stocks
- Bonds
- Business Interests
- Life Insurance
- Retirement Plans
- Digital Assets
- Intellectual Property



# What is Planned Giving

Charitable contributions during lifetime or as part of estate plan:

- Bequests: wills, trusts, beneficiary designations (life insurance, IRA, financial accounts, DAFs)
- Charitable Gift Annuities
- Charitable Remainder Trusts; Charitable Lead Trusts
- Donor - Advised Fund (DAF)



# Fundraisers:

## Do you ask donors about planned gifts?

- Do you have an estate?
- Do you have an estate plan?
- Are you a **cobbler** – (wear no shoes)?
- Are you a chef – (don't eat your own cooking)?



# Motivations and Strategies

- **Donor Motivations**
  - Why donors include bequests
  - Beneficiary designations (DAFs, IRAs)
  - Taxes
- **Engaging Donors**
  - Identifying and engaging planned giving donors
  - Great Wealth Transfer



# Integrating Estate Planning & Planned Giving

- Incorporating into fundraising practices
- Engagement: Connecting with varied backgrounds/communities
- Outreach: Events, storytelling techniques, marketing, cultural, and affinity connections



# Integrating Estate Planning & Planned Giving

## *Cont'd*

- **April:** Financial Literacy Month
- **August:** National Make-A-Will Month
- **October:** DAF Day
- **October:** National Estate Planning Awareness Week (*3<sup>rd</sup> week in Oct.*)
- Seminars, Marketing, Professional Advisors



# Case Study

## John and Mary:

Business Succession

Family Dynamics

Irrevocable Life Insurance Trust

DAF

*How would you help them?*



# Case Study

Sam:

Loyal Supporter

You want to close the gift now

*Why is updating his estate plan taking so long?*



# Case Study

## Charitable Remainder Annuity Trust (CRAT):

- Donor & beneficiary in their 40s
- \$100K cash/sold business
- Friend (beneficiary is alum)



# Key Takeaways

**Understand Donor Motivations:** Know why donors choose to give/what inspires them

**Effective Communication:** Build relationships, regular marketing, provide information

**Estate Planning and Planned Giving** are a pair – the Dynamic Duo!





# Questions?



# Thank You!



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LinkedIn: @Aquanetta Betts

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