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# 6 EYE-OPENING INSIGHTS

THAT PLANNED GIVING  
MARKETERS MUST SEE

A collaboration between  
The Stelter Company and Giving Docs



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## TWO GOALS

Nonprofit organizations want, for obvious reasons, to increase the number of donors who leave charitable bequests in their estate plans. This paper offers practical steps to deliver these desired results: **more donors leaving larger gifts in their estate plans.**

We also address a more important goal: **How to help donors feel even better about their choices to leave a legacy through planned giving than they might have otherwise.**

After all, donor satisfaction is of paramount importance. If we can increase the pleasure, self-realization and satisfaction of our legacy donors, we have done our job—and probably done a better job of securing their gifts for the long run.



# TWO LIKE-MINDED COMPANIES



The Stelter Company performs and aggregates extensive research on donor mindsets. Giving Docs works with [Dan Ariely's Center for Advanced Hindsight](#) to better understand what motivates people to give and how giving can make people feel better about themselves and experience a higher quality of life.

Together, Stelter and Giving Docs have developed scientifically backed insights to determine which actions nonprofit organizations can take to motivate their donor base to make planned gifts and—even more important—to increase donor satisfaction when they leave a gift as part of their legacy.





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# THREE DONOR OUTLOOKS AND BEHAVIORAL SCIENCE COMBOS

It is important to understand how donors think; such insight provides valuable guidance to how planned giving officers approach and steward relationships with their donors. When we add behavioral science principles to those communications, we can leverage the natural impulses and reactions every human being has, and improve the experience of legacy giving. The following three insights have been distilled into action plans for compelling the donor to commit to a legacy gift—enhancing the donor experience and facilitating long-term stewardship of the relationship.



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# DONOR OUTLOOK #1

“I am motivated to give  
to work that I feel is  
important and that I  
feel connected to.”





# DONOR OUTLOOK #1

It's important to understand that, in the mind of your donors, your organization is not the entity that has needs. *The people you serve* are the ones who have needs, and meeting those people's needs is what delivers emotional satisfaction to your donors.

After all, giving is fundamentally an emotionally driven choice.

Researchers theorize that motivations can be egoistic ("How does giving this gift benefit me?"), altruistic ("How does giving this gift benefit others?") or a combination of both of these motivations.

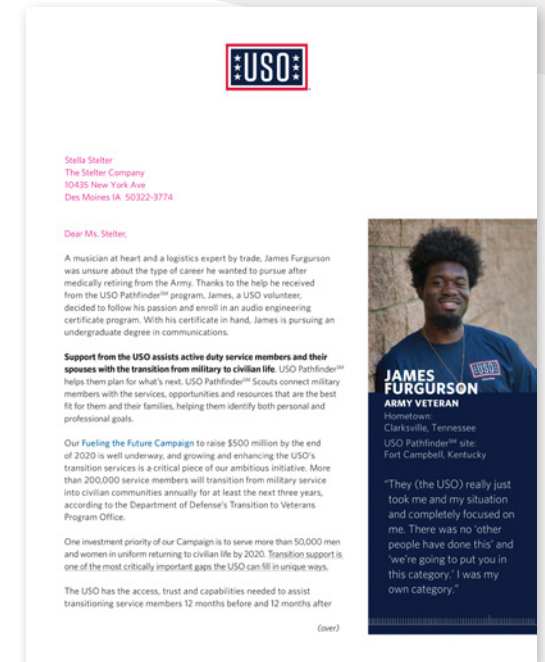
People give for myriad reasons, but the choice to give is ultimately driven by emotions.

Helping others makes us happy. This happiness comes from short-term releases of endorphins, which can be triggered repeatedly if we take steps to cultivate and nurture the repeated emotional payoff for our donors.



**JAMES FURGURSON**  
**ARMY VETERAN**

"They (the USO) really just took me and my situation and completely focused on me. There was no 'other people have done this' and 'we're going to put you in this category.' I was my own category."



**USO**

Stella Stelter  
The Stelter Company  
10435 New York Ave  
Des Moines IA 50322-3774

Dear Mr. Stelter:

A musician at heart and a logistics expert by trade, James Furgurson was unsure about the type of career he wanted to pursue after medically retiring from the Army. Thanks to the help he received from the USO Pathfinder program, James, a USO volunteer, decided to follow his passion and enroll in an audio engineering certificate program. With his certificate in hand, James is pursuing an undergraduate degree in communications.

**Support from the USO assists active duty service members and their spouses with the transition from military to civilian life.** USO Pathfinder helps them plan for what's next. USO Pathfinder Scouts connect military members with the services, opportunities and resources that are the best fit for them and their families, helping them identify both personal and professional goals.

Our **Fueling the Future Campaign** to raise \$500 million by the end of 2020 is well underway, and growing and enhancing the USO's transition services is a critical piece of our ambitious initiative. More than 200,000 service members will transition from military service into civilian communities annually for at least the next three years, according to the Department of Defense's Transition to Veterans Program Office.

One investment priority of our Campaign is to serve more than 50,000 men and women in uniform returning to civilian life by 2020. Transition support is one of the most critically important gaps the USO can fill in unique ways.

The USO has the access, trust and capabilities needed to assist transitioning service members 12 months before and 12 months after

(over)

**JAMES FURGURSON**  
**ARMY VETERAN**  
Hometown: Clarksville, Tennessee  
USO Pathfinder site: Fort Campbell, Kentucky

"They (the USO) really just took me and my situation and completely focused on me. There was no 'other people have done this' and 'we're going to put you in this category.' I was my own category."

## Stelter sample: USO.

This cover letter appeals to donors' emotions by showing a specific veteran served by the organization's Pathfinder program and letting him explain its value in his own words.

# BEHAVIORAL SCIENCE PRINCIPLE #1

## Tap into **Yes!** emotions.

Emotions influence the decisions we make—even decisions we’d prefer to believe we make for only rational reasons. Behavioral science researchers like those at the [Center for Advanced Hindsight](#) have explored a range of topics such as what makes us decide to purchase a particular type of jam to whether we decide to be an organ donor. A key insight gleaned from such research reveals that our emotions can be divided into three states—**Yes!**, **No!** and **Unengaged**—and these emotional states have a significant impact on how we make decisions.



### At a high level, our emotions drive us to:

- Keep doing something (known as a “Yes! emotional state”)
- Stop doing something (known as a “No! emotional state”)

When our emotions are not activated, we are Unengaged—in a nonemotional, rational state.



# BEHAVIORAL SCIENCE PRINCIPLE #1

While you might assume that people make their best decisions when in a nonemotional, rational state, this isn't necessarily true. After all, we are emotional beings seeking emotional satisfaction, and the “best decision” is not always defined by what is rationally most sensible. “Best decision” may be defined by what delivers the highest emotional reward or what is most beneficial for the world. “Best” is a subjective label when it comes to evaluating a decision like whether to become a legacy donor. After all, the scrooge in your family might insist that keeping all your money for yourself is the “best” way to live while a philanthropist will argue that giving brings the most happiness. (Psychologists tend to support the latter view, assuming basic needs have been met.)



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# BEHAVIORAL SCIENCE PRINCIPLE #1

## How Yes! Emotions And No! Emotions Affect Decisions

Yes! emotions make us want to keep going. They include pleasure, laughter, anticipation and nostalgia. They are the emotions that make us long for something or make us glad or grateful.

No! emotions are painful, and they make us do whatever we can to make those feelings go away. They include disgust, fear, boredom, shame and anger.

Researchers have found that Yes! emotions increase our willingness to buy something, to invest or to pursue an

opportunity. When feeling Yes! emotions, we are more likely to be the first person to say “I love you” or to decide to give to a charity. On the contrary, No! emotions cause us to shut down before we can even consider if the opportunity is a good or bad one. A No! emotion might cause you to decline an invitation to a party. While we’d like to believe that most of our decisions are made for purely rational reasons, the truth is we don’t even open ourselves up to *making* a decision without an influential Yes! or No! emotion preceding it. Just listen to [Dan Ariely’s TED talk](#) about how much our everyday decisions are influenced by emotions.





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# BEHAVIORAL SCIENCE PRINCIPLE #1

## **Yes! Emotions and Planned Giving**

When we reflect on what we leave behind when we are gone, we want something more than just checking off boxes on a list. We try to live lives that feel worthy, purposeful and directed. We want to believe we can and have made a difference, and that the world is a better place because we were in it. We want to leave a mark that transcends our time on earth.

Wanting to leave a legacy is at its very heart an emotional desire that can serve as a satisfying final chapter to a person's life. When a nonprofit facilitates this decision in an emotionally supportive way, the experience can be much more satisfying to the donor.



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# TAKEAWAY

Provide an emotional payoff that is both satisfying and lasting.

Nonprofits can achieve this by taking the following actions:



Find emotionally accessible examples of the important needs your organization meets. Do you feed the hungry? House the homeless? What good does your organization do, and for what people or tangible causes?



Tell emotionally rich stories about the work your organization performs. When a donor chooses to leave a legacy gift, tie that choice to a story that provides emotional fulfillment. For example, a legacy gift might be used to provide clean water to a village in Africa or to fund an effort to defend the underprivileged.



Trigger Yes! emotions such as happiness, purposefulness, nostalgia and importance through positive stories, celebrations of wins and expressions of gratitude when donors take action.



# TAKEAWAY

Throughout the process, from initial outreach to stewardship, feed donors a constant diet of Yes! emotions. These Yes! emotions can be nurtured by messaging that reinforces the following:

- 1 The need is real and ongoing, and real people need your support.
- 2 Your gift will make a difference and is appreciated by actual people. Real people are already benefiting from our organization's support, and you can be part of that. You can make a difference.
- 3 By giving in this manner, you are an exceptional person who has made a respectable choice to invest in purposeful living. Your choice to give makes you a good human being, and your choice has made an impact. You can feel good about your choice to give.



Stelter sample: Iowa State University. A newsletter cover story about a proud donor includes a refer to an inside story about a student who directly benefited from donors' generosity. The student story includes a pullout quote to emphasize the emotional impact that a gift can have.

**The scholarship helped me a lot. I live an hour away from campus and I've been able to cover childcare costs, for example. It's helped me balance my life as a student and being a mom.**

– AMY YAGER, Ethel Whitney Scholarship recipient

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# TAKEAWAY

Nonprofits will produce No! emotions if they do the following:

- ❶ Neglect to acknowledge a gift.
- ❷ Provide sterile, unemotional responses.
- ❸ Report only dry facts and statistics.
- ❹ Make donors feel like their gift was inconsequential and they will continually be asked to do more.

If a donor begins to feel that their gift is unimportant, unappreciated or not impactful, they may grow discouraged and decide their money is more appreciated and needed elsewhere.





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## DONOR OUTLOOK #2

“I donate to organizations  
that I believe will achieve  
the impact I want  
to make.”

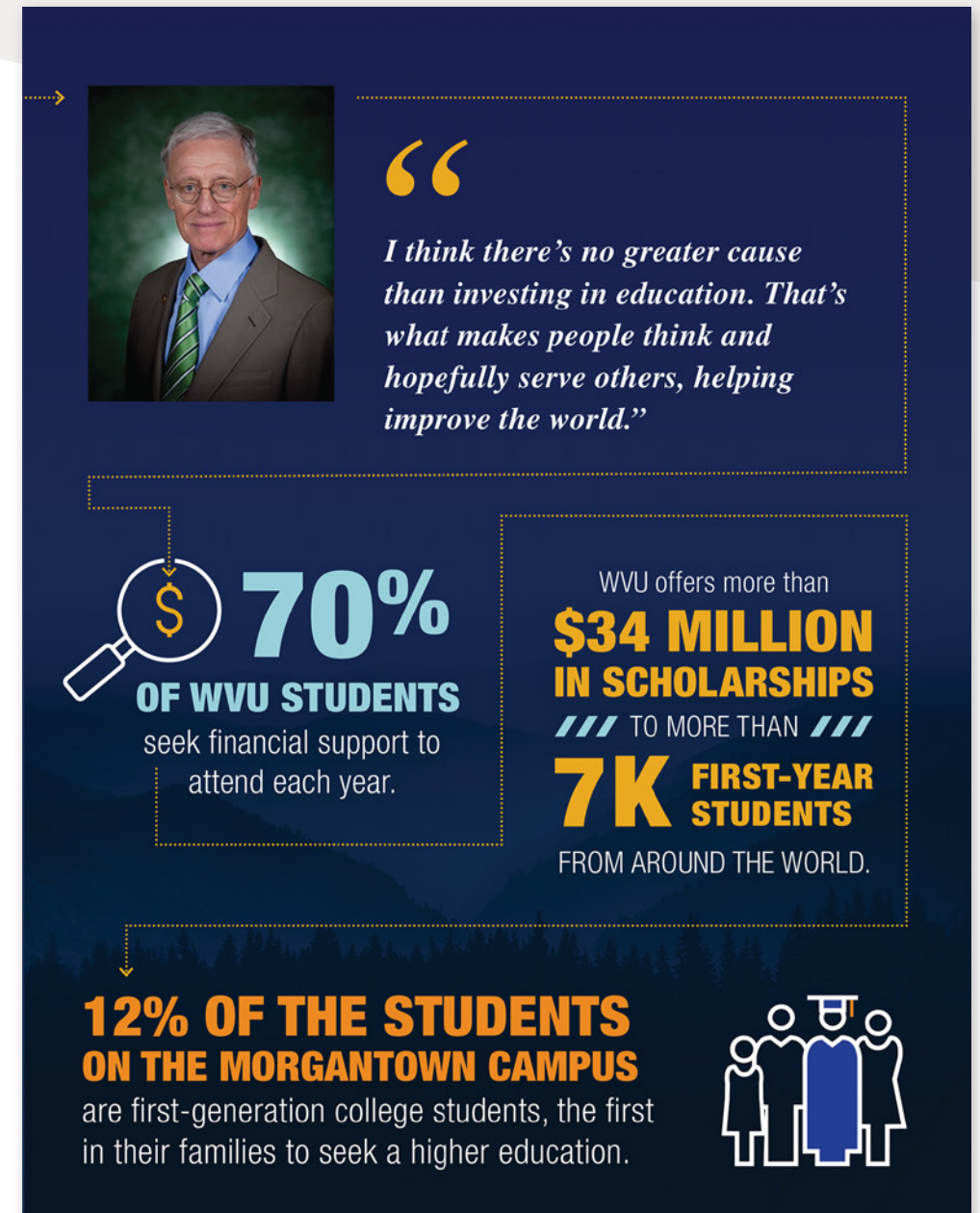
## DONOR OUTLOOK #2

This outlook drives a donor's decision on which nonprofits to support, assuming your donor has already decided they want to leave a legacy and are now looking for the right organization to make the impact they desire. How can your organization stand out as the one that will further their cause?

### Impact Matters

[Giving USA's 2020 Leaving a Legacy report](#) surveyed legacy donors on their motivations for making planned gifts. The top motivations reported were:

- 1 The cause is personally important to me. **(78.8%)**
- 2 I believe that the nonprofit makes a significant impact. **(75.5%)**



**Stelter sample: West Virginia University.** An infographic within a newsletter package includes a donor quote to spur action plus details showing how the school makes an impact.



The issue of hunger in America is complex, enduring and widespread. About 37 million people struggle with hunger in the U.S., making the need for Feeding America's research, advocacy and nationwide network of 200 food banks and 60,000 food pantries and meal programs more urgent than ever. Yet Feeding America isn't funded by commercial means. Instead, we rely on donors like you to fuel the fight against hunger long term.

#### YOUR BENEFITS

A gift to Feeding America in your will or financial plan:

- enables you to make a greater impact than you may have thought possible
- may provide you with financial and/or tax benefits
- is often realized after your lifetime, so your current budget isn't affected

## DONOR OUTLOOK #2

When asked to rank their top factors for choosing which organizations would receive their largest legacy gift (aside from mission), the following factors ranked highest:

- 1 The organization has a track record of success **(65.1%)**
- 2 I expect the organization to be around for a long time **(64.1%)**

All four of these factors, which can be summarized as importance, impact, success and longevity, tell us how critical it is to donors that their contribution will make a significant and lasting difference in the world.

### WHY FEEDING AMERICA



**1 in 7**  
Americans receive help each year



**4.6 billion**  
Meals are provided each year



**99%**  
Of donations raised go directly to programs for people in need



**4-star rating**  
Charity Navigator's highest overall rating

To learn how you can support a hunger-free America, contact Jessica Noe at (800) 771-2303, Ext. 5593.

### HOW YOUR WILL HELPS FIGHT HUNGER

It all starts with a gift in your will to Feeding America



we rescue nutritious food



and get it to local food banks



which distribute it to 60,000 food programs



that feed more than 40 million people in need

The Feeding America network of food banks reaches every county in the U.S.—including yours.

**Stelter sample: Feeding America.** Print packages include details that illustrate the nonprofit's competence and help donors see how their money will be wisely spent and make a significant impact.

# BEHAVIORAL SCIENCE

## PRINCIPLE #2

Concrete examples of getting it done help people feel confident that your organization is one they can trust.

The term “concrete,” as used in behavioral science, means something specific, identifiable and relatable. Here’s an example of an abstract appeal versus a concrete appeal.

### ABSTRACT APPEAL

“There are 200 million children in need throughout the world. Help them today.”



### CONCRETE APPEAL

“Steven is hungry. \$20 per month would feed him and his family. Will you help Steven today?”

# BEHAVIORAL SCIENCE PRINCIPLE #2

We are much more likely to be moved to give when presented with concrete images and options for helping than when shown only statistics and abstract concepts.

## What are keys to making a concrete appeal?

- 1 Visually present the person, animal or issue of need.



We have a hard time visualizing statistics, but a well-chosen image helps us relate with the need being described. We can relate with the person in need when we see them.

This is called the identifiable victim effect, which is illustrated by the adage “A single death is a tragedy. A million deaths is a statistic.”

- 2 Describe the need in simple and relatable terms.

## Example: “Steven is hungry.”

We’ve all been hungry before. We can easily imagine what it feels like to need food.

- 3 Present the solution in simple, doable terms.

The help your organization provides may involve layers of complexity, but the solution should be worded simply, in a way that makes it attainable to a donor. The formula: “[This act] will provide [this tangible relief] to [this real person].”

You may be tempted to argue that the landscape is different for planned giving, but really, the appeal process is similar. Just apply this formula to a larger, longer-lasting scope.

# TAKEAWAY

Use concrete messaging and examples to show your organization can get the job done.

Nonprofits can achieve this by spotlighting specific projects that have tangible impact. Give the details. Tell the stories of the real people impacted. Use numbers and show tangible evidence of success. Answer these questions:

- 1 How much support was delivered and how?
- 2 What quantity of supplies was distributed?
- 3 How many lives were affected, and in what way?
- 4 How was the life of a relatable benefactor improved?



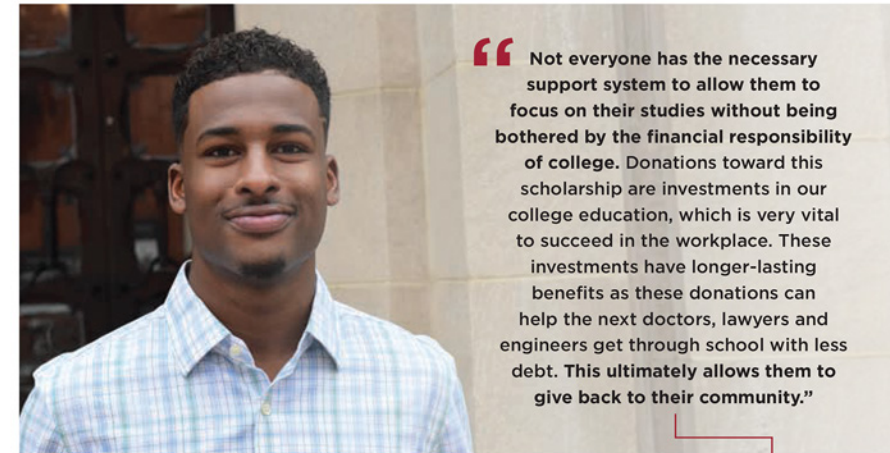
**Stelter sample: University of Maryland.** Including updates of special campaigns in regular correspondence helps donors view a nonprofit as a trusted, transparent steward of gifts.



# TAKEAWAY

Ways to answer those questions include:

- **Get permission from a person or cause that has benefited from your organization's efforts and spotlight that cause.** Name the person or cause, and show what the need is and how that need has been met by your organization.
- **Use pictures of real people.** Tell their story (with permission, of course). Show the positive impact in tangible terms.
- **Ask your donor audience to meet needs of people or causes like the concrete example you have provided.** If possible, showcase a real unmet need and tell your audience how their donations could meet these real needs for real people or causes.
- **Provide proof** that you have gotten the job done in the past and have the plans in place to continue getting it done for decades to come.



“Not everyone has the necessary support system to allow them to focus on their studies without being bothered by the financial responsibility of college. Donations toward this scholarship are investments in our college education, which is very vital to succeed in the workplace. These investments have longer-lasting benefits as these donations can help the next doctors, lawyers and engineers get through school with less debt. This ultimately allows them to give back to their community.”

*Continued from front*

I hope you'll also consider solidifying your values, as well as your commitment to the University with a gift in your will or estate plan. Every gift makes a difference, transforms lives and opens doors of opportunity for Temple students like Abu (above) who need help bridging the financial gap to achieve their dreams and, ultimately, change the world.

To receive your free copy of the *Personal Estate Planning Kit*, please complete and return the enclosed reply card, or reach out to me.

Again, thank you for your unwavering support for Temple University—for our students, our faculty and our research.

Sincerely,

Tom Yates  
Executive Director of Gift Planning  
(215) 926-2545  
tyates@temple.edu

**P.S.** Return the enclosed reply card **today** to request your **FREE** planning kit!

## Abu E., CPH '21

Shortly after starting at Temple University in the College of Liberal Arts, Abu realized his ultimate goal of becoming a dermatologist. With the change to the College of Public Health came an increase in tuition, and for an out-of-state student like Abu, that increase was not insignificant.

Even with his loans, there was a possibility he'd have to move back home to continue his studies due to lack of financial resources. The Broad Street Finish Line Scholarship helped Abu pay for his tuition, allowing him to continue to study at his chosen school.

**Stelter sample: Temple University.** A cover letter's gift request becomes more authentic when an excerpt is paired with a photo and short bio of a scholarship recipient.

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## DONOR OUTLOOK #3

“Other people like me  
make choices like this.”





# DONOR OUTLOOK #3

People are influenced by the actions of others and by what they think others expect from them. When donors believe that others like them are acting in a certain way, they are more likely to act in the same way. One research experiment examining outright giving indicated that highlighting descriptive social norms localized to the donor’s environment (e.g., “this is what most people do in this neighborhood”) could double the number of donors and size of donations compared with altruistic appeals alone.

Sharing stories of donors who have made legacy gifts can also inspire prospects to action. In a 2016 study, researchers found that individuals were more interested in making a legacy gift after being exposed to stories of others who had done so, and stories of living donors were consistently more effective than stories of deceased donors.



**Syracuse University**

**Forever Syracuse** FALL 2019

**Jim and Linda Balducci: When Orange Calls You Home**

Jim Balducci '69 and his wife, Linda, are Syracuse University through and through. They show their love of being Orange in a multitude of ways.

For Jim, orange is the color of greatness—Syracuse University helped shape the trajectory of his life. He literally wears his pride “on his sleeve” in the many orange-colored shirts he buys at the campus bookstore, and there are Syracuse University blankets and decorations throughout his home. You cannot miss him on the road—his Subaru Crosstrek is orange, the interior is black leather with orange stitching, and the license plate reads, “GO SU 44.”

Most meaningful to the Balduccis, though, is their support of Syracuse University students enrolled now, as well as those who will attend in the future. As a benefit of their philanthropy, they became members of the 1870 Society (the legacy society), joining visionary individuals who have remembered Syracuse University in their long-term financial and estate plans.

“We wanted to do something that would make an impact on the students but would also ensure our financial freedom during our lifetimes.” —Jim Balducci '69

Continued on Page 2

**Stelter sample:**  
**Syracuse University.** In a newsletter feature, donors decked out in school colors come across as typical, “real” fans doing their part for a place they believe in. The pullout quote adds a “you can do this too” element.



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# BEHAVIORAL SCIENCE

## PRINCIPLE #3

Social norms and social incentives are powerful influencers—and powerful tools.

Remember back in junior high when you begged your parents for a specific type of clothing so you could fit in? Social norms dictate everything: what we eat, what we wear, how we interact with people. We are social creatures with a strong desire to be accepted by our peers and to identify with the types of people we admire or associate with.

Most of us want to believe we've outgrown the need to fit in, but studies show that even intelligent adults will do crazy things just to be accepted by their peers. One such study conducted by [Solomon Asch](#), a renowned researcher with a keen interest in social norms and conformity, invited

Swarthmore College students to take a “vision test,” during which test subjects were placed in a group with complicit actors. The group was asked to observe and compare the lengths of lines on a paper to a line on another sheet. Even though the correct answer was obvious, the actors all gave the wrong answer. When it came time for the test subjects to answer, they were faced with the choice to disagree with the other study participants (go against social norms) or to go against the obvious and agree with the others.

## BEHAVIORAL SCIENCE PRINCIPLE #3

Can you guess how often study participants caved in to peer pressure and gave the wrong answer? Thirty-two percent conformed in the majority of the trials. Seventy-five percent of the participants conformed at least once. Only 25% never conformed.

If you're wondering how obvious or ambiguous the correct answers were, the control group got the answer wrong only 1% of the time. The right answer was plain as day, but the desire to conform to social norms was powerful enough to get the study participants to give answers that ran counter to their senses.

Social norms are powerful influencers on what we determine to be worthy of our time, attention and money—and that includes what we do with our wealth.



Add social incentives to the mix—praise, social recognition, improved social status—and you've got a powerful tool at your disposal.

# BEHAVIORAL SCIENCE PRINCIPLE #3

## Social Norms and Planned Giving

When it comes to planned giving, it's important to communicate to your donor base that it is normal and even expected to leave a legacy gift. Your donors need to feel confident that "people like me leave legacy gifts." To achieve this, you will need to do the following:

- 1 Help the donor realize that they are not betraying their friends and family if they choose to give some of their estate to a cause instead of leaving it all to loved ones. It's a perfectly normal thing to do, and lots of people **exactly like them** do it every day!
- 2 Use highly specific examples of actual planned giving donors, and ask permission to use their pictures in the outreach. The closer the example is to the target audience, the more likely they are to be influenced.

**Stelter sample: Iowa State University.** Pullout quotes showcase donors speaking from the heart.



*"I speak with humility and gratitude for Iowa State University and the people thereof for providing Peter and me with an outstanding education and the opportunities to serve two distinguished careers covering 77 combined years at an outstanding university, which we love dearly."*

– DR. LORRAINE HOFFMAN

## Circuitous and

*Continued from Page 1*  
recognized for her contributions in the field of veterinary microbiology.  
Lorraine described her professional career as "circuitous and fortuitous."  
"I had to redefine myself, develop skills, and know I had and work hard to learn and become the best I could be," Lorraine said.  
To be a life-long role model for others, Lorraine's greatest joys, which has continued in her life. "I feel blessed to share far greater in life with empathy than what I received as a young person in a small Iowa town at a time when women were expected to explore and pursue specific career paths straight out of high school," Lorraine said.  
The Hoffmans are proud that they could continue to higher education through the Drs. L. M. Peter Hoffman Scholarship in Swine Health within the College of Veterinary Medicine, which is made possible through a portion of the resources made available at Iowa State.  
Today, she has advice for others who are considering the step of giving and how to make an impact.  
"You need to remember the opportunities that come along the way and think about how you can help young people as they pursue their dreams in areas for which you share a passion, and what has defined your career path and made a difference."

 **Your gift can open the opportunity.** Whether you are a staff member, or faithful volunteer, your gift can help sustain life-changing education for the future. Contact the office of gift planning at Iowa State to come. Contact the office of gift planning at [isugift.org](http://isugift.org) to start your giving journey.



# BEHAVIORAL SCIENCE PRINCIPLE #3

## Social Incentives and Planned Giving

We human beings are social creatures with a strong motivation to belong. Many people consider peer recognition and approval when deciding to make a planned gift, so it's helpful to highlight how their gift will be perceived by others. Legacy society inclusion is a badge of honor for many, and highlighting legacy donors has the double benefit of showing gratitude to your current donors while also persuading others to join the club.



"My mom and dad have to go without just so that us kids can have food in our stomachs. It makes me sad, because it's either I can eat their food or **I don't eat at all.**"

—Zoey, age 8

## Your legacy. Her future. An America where no one is hungry.

The van Hengel Society honors the legacy of John van Hengel, who started the nation's first food bank in 1979. His simple, compassionate idea has since grown to a network of 200 food banks that help provide food to more than 40 million people in America each year, including more than 12 million children.

To continue this giving tradition, Feeding America® invites you to join the van Hengel Society. This visionary group shares your passion for ending hunger in America. Membership is open to individuals who have included a gift to Feeding America in their will or other estate plan.

Members of the van Hengel Society receive a certificate of membership, special reports about the latest initiatives of Feeding America and acknowledgement in our annual reports.

It would be an honor to welcome you into the van Hengel Society. Please accept our invitation using the enclosed reply card or by visiting [feedingamerica.org/society](https://feedingamerica.org/society).

**Stelter sample: Feeding America.** Legacy society invitations in donor outreach serve the dual purpose of thanking donors while enticing them with the possibility of being part of a special group.

# TAKEAWAY

## Demonstrate the social acceptance of planned giving.

- 1 Spotlight legacy donors to show “people like you are choosing to leave our nonprofit in their estate plans.” With permission, use their photos and quotes. Pictures make the social norms more evident, especially if the person pictured looks relatable.
- 2 Use messaging aligned with Dr. Russell James’ winning words “Many people like to leave a gift to charity in wills to support causes that have been important in their lives.” James found that social norm statements have a positive effect on reported bequest intentions, both on their own and when combined with persuasively worded questions.



**Stelter sample: The Museum of Flight.**  
A legacy society member’s quote on a reply card, paired with a casual photo, gives potential donors some food for thought.

### Some variations of this messaging that we’ve found to be effective are:

- “Join the thousands of [Organization Name] supporters who have left a gift.”
- “Many people report legacy giving to be one of the most impactful expressions of their values in their lifetime.”

# TAKEAWAY

- 3 Display a progress bar that shows how many other people have contributed to your cause. (Note: It's only effective to show a progress bar after you've hit 50% of your goal—just as people are more likely to add to the tip jar if it's already seeded with a handful of ones, a couple of fives and a ten.)
- 4 Provide social recognition in any or all of the following ways:
  - Spotlight the donor in a newsletter or page on your website.
  - Name a garden after the donor, etch their name on a brick or honor them with a plaque.
  - Send a handwritten thank-you card signed by high-profile representatives of your organization honoring the donor.

**Stelter sample: University of Maryland.** A progress bar entices donors to help the school in its final push toward a campaign goal.



## News From Washington

**THE CARES (CORONAVIRUS AID, RELIEF, AND ECONOMIC SECURITY) ACT** was passed in 2020 to offer relief to residents, businesses and nonprofits in the wake of the coronavirus pandemic. We are excited to share that some benefits were extended (and, in one case, increased).



### GIVING UPDATES IN 2021:

1.

For those who itemize on their taxes, the universal charitable deduction has been extended and upgraded. The new deduction is \$300 for single filers and \$600 for married couples filing jointly.

2.

Contributions to nonprofits are generally limited to a percentage of a taxpayer's adjusted gross income (AGI). The CARES Act lifted this cap from 60% to 100% in 2020. Now, it's been extended into 2021. Any excess contributions can be carried over to the next five years.

3.

The required minimum distribution (RMD) was suspended in 2020. This year, those 72 and older must again take this distribution from their IRA. Consider putting yours to work for UMD with a tax-free gift! Contact the Office of Gift Planning for details.

### HELP US CROSS THE FINISH LINE!



**UMD has reached \$1.4B of our \$1.5B goal for Fearless Ideas: The Campaign for Maryland.**  
You can help us reach our goal. Take advantage of this year's special tax incentives to make a gift today. Contact the Office of Gift Planning to see how you can take part.



UNIVERSITY OF  
MARYLAND

Office of Gift Planning

866.646.4UMD • [giftplanning@umd.edu](mailto:giftplanning@umd.edu)  
[giftplanning.umd.edu](https://giftplanning.umd.edu)

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## ON THE HORIZON

Increasing the number of donors who make planned gifts, even by a small margin, can profoundly shape a nonprofit's future. Furthermore, holistically improving the donor experience can truly cement the relationship. We contend that by combining these principles of behavioral science with a deep understanding of donor outlooks, you can satisfy the desires of both a donor's mind and a donor's heart. This blueprint—field-tested and backed by science—offers you a promising start.



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# AUTHOR PROFILES



## **Brantley Boyett**

President and Co-Founder, Giving Docs

After practicing law for over a decade, Brantley founded Giving Docs in 2015. Under his leadership, Giving Docs has partnered with Duke University's Center for Advanced Hindsight, a behavioral science lab founded by Dan Ariely, to rethink how estate planning can work. In addition to building Giving Docs, he also teaches Law and Entrepreneurship at Duke University School of Law.



## **Nathan Stelter**

President, The Stelter Company

Nathan leads The Stelter Company, a leading integrated marketing agency offering consulting, campaign, creative, digital and data analytic services. Founded in 1962, Stelter partners with more than 1,300 organizations, delivering marketing programs based on scientific data and a holistic view of the donor journey, informed by donor-centric research and focused on helping nonprofits maximize revenues across their development portfolios.



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