

# LegacyLife

## Charitable Gift Worksheet

A better way to give



- Step 1: Number of donors between the age of 45 and 65 who have contributed \$1,500 a year for 3 years \_\_\_\_\_ x 6% = \_\_\_\_\_ x \$25,000 = \_\_\_\_\_
- Step 2: Number of donors between the age of 45 and 65 who have contributed \$2,500 a year for 3 years \_\_\_\_\_ x 6% = \_\_\_\_\_ x \$50,000 = \_\_\_\_\_
- Step 3: Number of donors between the age of 45 and 65 who have contributed \$5,000 a year for 3 years \_\_\_\_\_ x 6% = \_\_\_\_\_ x \$100,000 = \_\_\_\_\_
- Step 4: Number of 'couples donors' between the age of 45 and 65 who have contributed \$6,000 a year for 5 years \_\_\_\_\_ x 8% = \_\_\_\_\_ x \$250,000 = \_\_\_\_\_

**Total Potential Gifts \$** \_\_\_\_\_

- Add steps 1 through 4 to get a total 'potential charitable gift' amount for your organization over time using Legacy Life Giving as a charitable tool.
  - The percentages can be increased or decreased based on the strength of your relationship with your donor and the strength of your message.
  - The longer a contributor has been donating the more likely they are to leave a gift.
  - If you have a contributor/volunteer they will be more likely to leave a gift.
  - Board members who are contributors are also more likely to leave a gift.
- With Legacy Life Gifts the donor receives a tax deduction for their contribution just as they do with current donations to your organization.
- Unlike 'bequests,' Legacy Life Gifts are guaranteed to your organization. The average size of a 'bequest' nationally is \$35,000 +/-, and while statistics vary, the percentage of 'committed' bequests received by non-profits is somewhere around 50%.