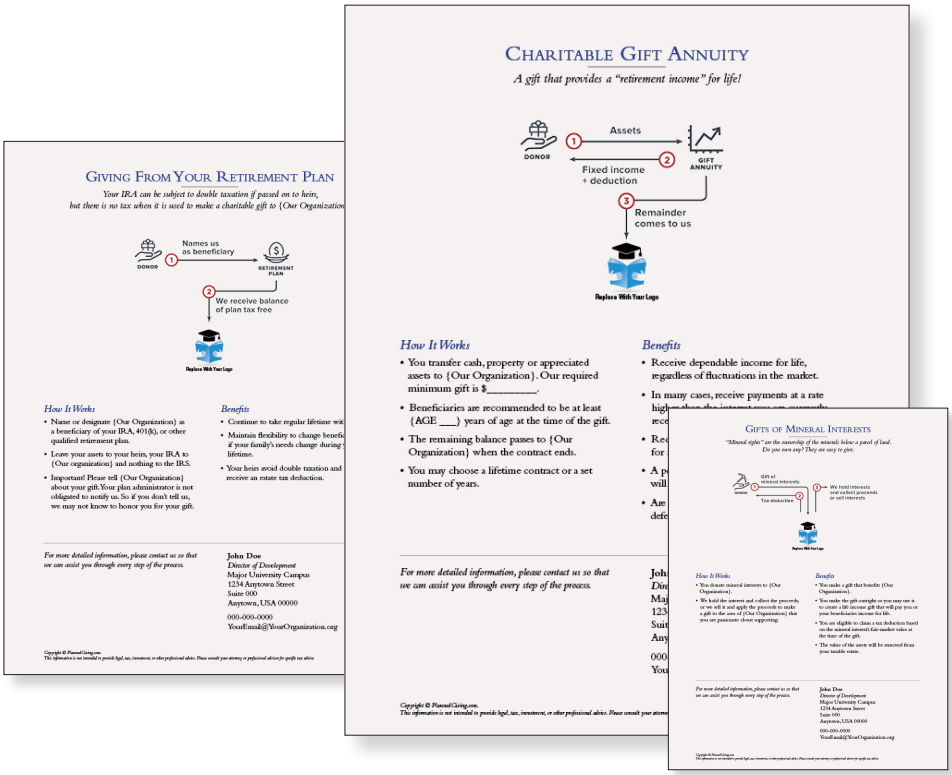
Gift Plan "Sell" Sheets

A Must-Have for Any Gift Planning Office



SIMPLE GIFTS

Bequests
Retirement Plans
Life Insurance
Real Estate
Mineral Interests
Appreciated Assets
Business Interests

LIFE INCOME GIFTS

Gift Annuity
Deferred Gift Annuity
Flexible Gift Annuity
Remainder Annuity Trust
Remainder Unitrust

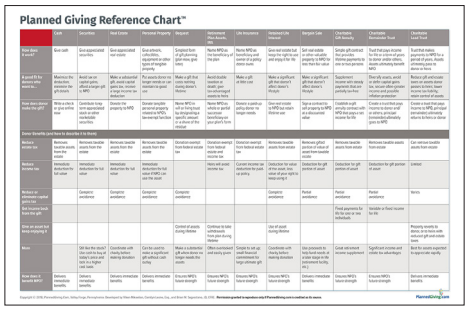
GIFTS THAT PROTECT ASSETS

Lead Trusts
Retained Lifes Estate
Bargain Sale

Need a spec sheet for an esoteric gift plan? Let us know. (Flip Trusts, Gifts of Cattle, Collectibles, etc.)

- Up to 15 total; professionally designed
- Expertly drawn gift diagrams
- Expertly written and easy to "get"
- Several elevator pitches to choose from
- Branded with your name and logo
- You're allowed to edit (two rounds)
- Perfect as leave-behind pieces
- Perfect for advisors, attorneys, board
- Handy for Legacy Society event materials
- Perfect to assimilate in a pocket folder
- One (1) Pocket Guides for Fundraisers
- One (1) Pocket Guides for Board Members
- One (1) Pocket Guides for Beginners/Staff
- Ten (10) Gift Comparison Charts
- 20% subscription discount: Giving Tomorrow™
- Confidence of having us as a trusted partner
- **8.5 x 11, delivered to you as PDFs**
- **Royalty-free: print as many as you wish**

new



$1,445.00
(Customized; delivered as PDFs)

$895.00
(InDesign files only; your marketing team customizes*)

Includes 1 of each Pocket Guide and 10 Gift Comparison Charts

***Adobe InDesign required. MAC or PC.**