

# THE PLANNED GIVING NEWSLET™

Like a booklet, a Newslet is just that — a smaller, more practical, more affordable and a more digestible stewardship piece.

Unlike the traditional planned giving newsletter that is challenging to implement, the Newslet addresses your need to deliver your message in an affordable and expeditious manner. It's quicker and less time consuming to produce, too.

The germination of the Planned Giving Newslet arose from a need in our marketplace for a marketing tool that's far easier and less time consuming to produce.

For more information on how you can benefit from this latest product, we offer a free one-on-one marketing assessment. Discover how the Newslet is the perfect replacement for the traditional newsletter.

Tipped in reply card included.



## The Newslet™. Designed for Impact.

Just like our postcards, Planned Giving Newslets make it easy to follow industry marketing norms:

- 🌱 **Marketing 101:** You need greater frequency to get your message through. Since Newslets are less expensive than traditional newsletters, you can now mail more often.
- 🌱 We offer several attention grabbing headlines to build readership and trust.
- 🌱 The Newslets carry a consistent theme. Each Newslet has its own sections, so the reader knows where to look.
- 🌱 The Newslets are written in simple, plain English. Perfect for the “sophisticated” donor, and easy to understand for those who are less versed about planned giving.
- 🌱 Option: create an online version for your e-broadcasts.



# NEWSLET ANATOMY

This is a sample. Content can be customized.

Possible board member

Sample gift language

Legislation affecting giving

Sample Gift Language

A gift to Sarah A. Reed Children's Center in your will or revocable trust enables you to support our mission and make a difference in the lives of future generations. A bequest:

- ✓ Is easy to arrange.
- ✓ Will not alter your current lifestyle in any way.
- ✓ Can be easily modified to address your changing needs.

Residual Gift Language

A residual bequest comes to us after your estate expenses and specific bequests are paid:

I give and devise to Sarah A. Reed Children's Center (Tax ID #25-0065486), located in Erie, PA, at (or state a percentage) of the net, residue, and remainder of my estate, both real and personal, to be used for its general support (or for the support of a specific fund or program).

Specific Gift Language

Naming Sarah A. Reed Children's Center as a beneficiary of a specific amount from your estate is easy:

I give and devise to Sarah A. Reed Children's Center (Tax ID #25-0065486), located in Erie, PA, the sum of \$ (or assets) to be used for its general support (or for the support of a specific fund or program).

John T. Roston

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The SECURE Act and Ways to Give

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Mr. John and Jane Doe  
123 Hemlock Road  
Suite 500  
Anytown, USA 00000

Welcome by Fundraisers

Soaring to New Heights

News from the Mary A. Reese Legacy Society

A SIMPLE GIFT

I believe in helping children. Can it get any better? And it's so easy. Because there's a gift you can make that costs you nothing during lifetimes. Just leave a small portion of your estate to Sarah Reed (or, any portion you like). All you need is the simple language on the last page.

Read this newsletter as it has some cool stuff. Each month there will also be an estate planning section. Even if you've written your will, it will have tips and reminders for you to tweak it over time.

Remember, change is constant; your estate plan shouldn't be.

Cindy Burkow  
Director of Development

AMBER

My early years growing up in rural Pennsylvania were the hardest and scariest times of my life. When I was 8, I went into my first foster home. The trauma and loss I had experienced up to that point was just too overwhelming to process. Intense feelings of loss, anger and frustration consumed me. I battled severe depression for years and was later diagnosed with bipolar disorder. I went from one placement to the next, carrying those burdensome labels of 'depressed' and 'bipolar disorder,' with me. Nobody ever stopped to help me understand how those labels affected my behavior. How could I overcome these challenges and live a healthy, happy life if I didn't understand all of that changed when I was 14 and went to Sarah Reed.

FULL STORY: WWW.PALLETSTORY.COM

SOCIETY GROWS GREAT WHEN WE PLANT TREES IN WHOSE SHADE WE KNOW WE SHALL NEVER SIT.

GREEK PROVERB

Donor story; can continue online to an optional landing page

Online story landing page motivates readers to visit other areas of your planned giving website.

Landing Page\* (optional)

Alumni Parents & Friends

Planned Giving

NEED HELP?

Donor testimonials

Society News

Why We Give

Les Burton

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Legacy Society Luncheon

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Bequests.

A gift that costs nothing during lifetimes.

Appreciated Securities

But, low, high, and avoid capital gains.

Life Insurance

The gift behind the drawer.

Retirement Plans

A highly taxed asset. Consider leaving it to us and less taxed assets to heirs.

IRA Rollover

It's the "tax free" gift.

Sandy Miller

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Live Well. Leave Well.

Plan your estate for those you love...

ESTATE PLANNING TIPS FROM SARAH REED

Would You Like the IRS to Serve as Executor and Heir of Your Estate? It's Easy.

Don't write your will.

Without a will the court will decide how to disburse your assets. Of course, the court doesn't know (or care) that you have favorite family members, or that you want to remember a few of your favorite charities in your will.

Don't write your will.

Without a will, the court will select someone to handle your estate during probate. You may have selected a close friend to handle this responsibly, but the court won't know about that.

Don't write your will.

Without a will, the court will choose a guardian for your minor children. (Surely they'll make a responsible decision... right?)

Don't write your will.

Without a will, the estate tax dollars that the government collects will be used for, well, anything the government chooses. (Hint: they're probably not helping out your favorite charities.)

Oh, and one last thing...

Without a will, your grieving loved ones will face the responsibility of untangling your affairs and guessing about your gift intentions - because, without a will, they'll have to guess.

Clearly there are important reasons to write a will. Sure, it takes a little work, but it's easier than most people realize. We at Sarah Reed urge you not to put off this minor inconvenience. Writing a will is far too important to delay - for you, for your heirs, and for Sarah Reed.

People often get nervous about meeting with an attorney. But an attorney specializing in wills and estate planning is exactly the right person to help you accomplish your goals for yourself, your loved ones, and your legacy. And the peace of mind you'll experience with a thoughtfully prepared will is well worth the effort.

Over 55% of Americans die without a will. Please don't be one of them.

By including Sarah Reed in your will or estate plan, you will enhance the well-being of children, adults and families, helping them realize their potential and experience success for generations to come.

Use the supplied language to help their future.

News You Can Use

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Estate planning tips

\*As an option, host your Newsletter online (highly recommended)

List of popular gift plans

Recent news