

**QUESTION POSTED ON LISTSERV:**

Colleagues,

I am interested in knowing how other institutions recognize planned gifts. Can you please send me your thoughts and any examples of letters that you send to your donors regarding planned gifts?

**RESPONSES:**

I am attaching our current plan for these donors and hope it helps!  
(Filename: GENERAL Legacy Society guidelines)

Cheers

Laura Roston | Donor Relations Officer | Phoenix Children's Hospital Foundation | 2929 E. Camelback Rd. Unit #122 Phoenix, AZ 85016 | Ph: 602.546.2674 Fax: 602.546.2644

We recognize our planned giving donors in our "Cornerstone Associates" Society. There are 4 levels: Bronze for gifts of less than \$50,000; Silver for gifts of \$50,000 - \$249,999; Gold for gifts of \$250 - \$999,999; and Platinum for gifts over \$1,000,000.

This site is dedicated to planned giving at NIU, if you'd like to have a look:  
<http://www.plan.gs/Home.do?orgId=273>

and this site is dedicated to the recognition society that lists benefits and so on:  
<http://www.plan.gs/Article.do?orgId=273&articleId=8598>

There is also a bi-annual newsletter that is sent to those in the society and those who are considering a planned gift to the university.

It is just in the recent few years that we've been able to build the program, so we're still a little small, but we're working on that.

Hope this helps.

Abby

Abigail Dean  
Associate Director of Donor Relations  
NIU Foundation  
Office: (815) 753-5421

We give planned giving donors a personalized plaque. We also do an annual dinner.

Colleen Lampton-Brill '90

Director of Donor Relations & Development Communications  
University of Dayton  
300 College Park Drive  
Dayton, OH 45469  
(937) 229-3547

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we have a "founders society," and i attach the template welcome letter here.  
Filename: sample to send 6.10

hope this is helpful,

lora sharpe

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Attached is a letter than we send along with a brochure about our Children's Hope Society when we find out that someone has included us in their will.

Please let me know if you have any questions. I would be interested to see other responses to this inquiry.

Thanks!

Filename: Children's Hope

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One Perkins Square  
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We at South Carolina have a separate giving society for all planned gifts. This group is handled thru our Planned Giving group. Anyone who has the University of South Carolina in their will and has signed appropriate documents is eligible to be a member. Depending on the amount the donor could also be a member of other recognition societies on campus

Hope this helps

Thanks

Cary Henderson