



Important Considerations in Making a Planned Gift

- Impact
 - Local nonprofit vs. college/university

- Evaluating a nonprofit's sustainability
 - Executive Leadership
 - Board & Stakeholders
 - Long Term Vision
 - Financial Stability
 - Donor Relations

- Do you have a specific objective in making the gift?

- What values do you want to communicate to your family or community?

- What are your expectations in terms of recognition for you – or your family?

- What is the nonprofit's capacity to handle a large windfall of cash?

- Does the nonprofit have the capacity to invest and manage an endowment?

- Who controls/holds the money? Do you want to have a family member serve as a representative?

- Do you want your estate gift to be invested in an endowment – or available to spend immediately on outreach or to build a facility? Are you comfortable delegating the decision to the Board of Directors?