

Blended Gifts : Achieving Maximum Impact

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UNC Advancement Symposium

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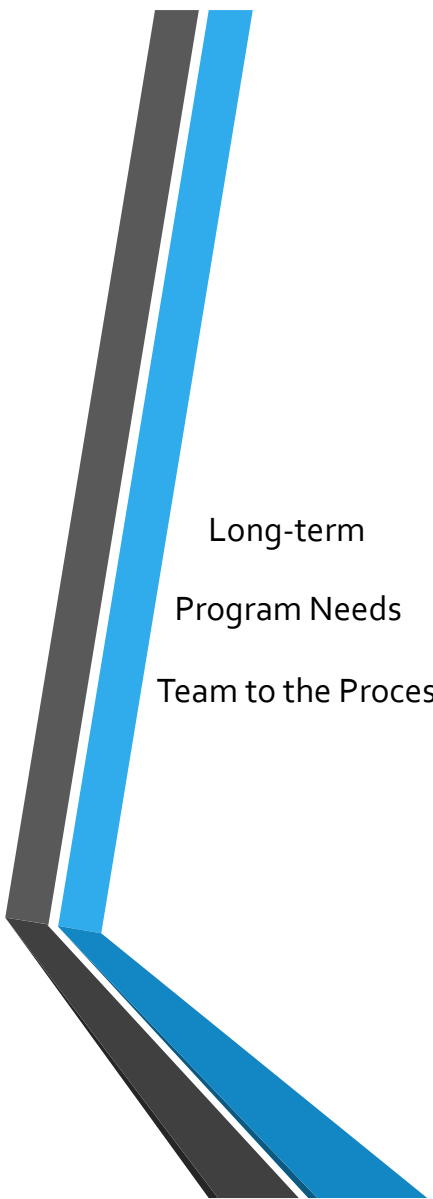


Objectives

- Define Blended Giving
- Benefits
- MGO/GPO Partnership
- How to Structure



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Two Sets Eyes/Ears
Multiple Touches
Trust



Stronger Proposal
Confidentiality
Better Results



Long-term
Program Needs
Team to the Process



Structure Plans
Tax Law
Donor's Advisors

Longtime Involvement
Dedicated to Mission



High Impact
Dream Big



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Clues



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MGO/PGO Partnership = \$\$ ↑

- Cash
- Securities
- Multi-year Pledge
- Bequest
- Tangible Personal Property


- Real Estate
- Charitable Gift Annuity
- Life Income Gift
- Trusts
- Retirement Assets
- Business Interests



Blended Gift Examples

- Current use gift and bequest
- Virtual endowment, current
- Annual gift, pledge, backed by bequest
- Annual gift, pledge, paired with irrevocable gift
- Tangible personal property plus endowment for support
- Gift that blends





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DISCUSSION



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