Blended Gifts: Achieving Maximum Impact

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Presented by Cynthia Butler and Steve Miller
Objectives

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

Annual
Major/Campaign
Planned

MGO/GPO Partners

Stronger Proposal
Confidentiality
Better Results

Two Sets Eyes/Ears
Multiple Touches
Trust

Partners

Prospects

Longtime Involvement
Dedicated to Mission

High Impact
Dream Big

MGO Role

GPO Role

Long-term
Program Needs
Team to the Process

Structure Plans
Tax Law
Donor’s Advisors

The University of North Carolina at Chapel Hill
MGO/PGO Partnership = $\uparrow$

- 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