



## The Best Prospects for Significant Charitable Gifts

Research shows that the following types of individuals represent the best prospects for significant charitable gifts:

### AGE 71 AND OLDER

- Late in life donors
- Fears that necessitated the bequest are likely no longer valid
- Have not died too soon
- Have provided for their families
- Have not outlived resources
- Have not suffered undue illness or disability
- Have continued to support the charity

### AGE 56 AND OVER

- Already retired or about to be retired
- Diminished family responsibilities
- Demonstrate a philanthropic intent
- Have assets available to fund major gifts
- Tax advantages are attractive

### UNDER AGE 55

- Empty nest
- Maximum earning years
- Increasingly concerned about retirement
- Prospects for life insurance gifts
- Often discovered by financial planning community because they are –
  - Planning for retirement
  - Planning to invest an inheritance

### BY FAMILY CATEGORY

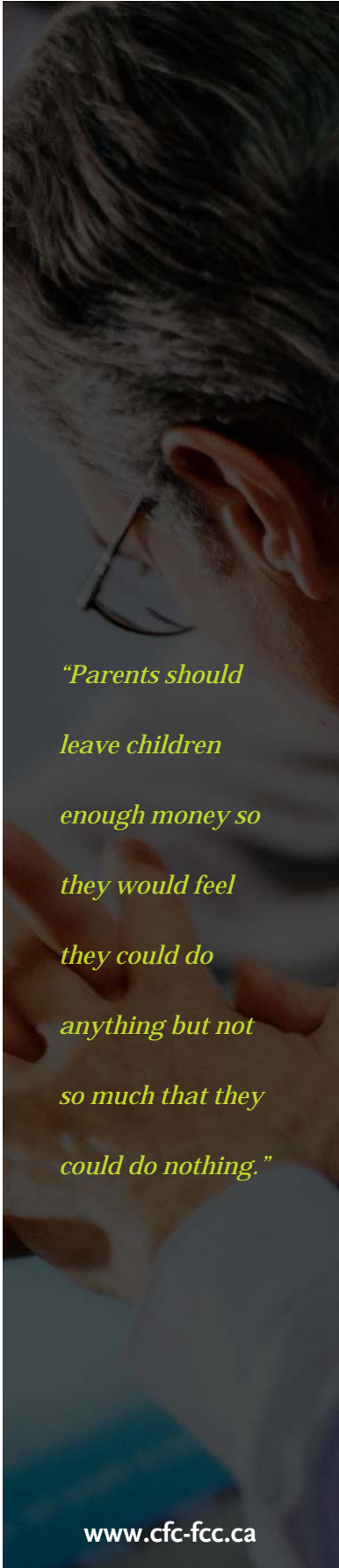
- Unmarried with no close family ties
- Married couples with no children
- Married couples with financially successful children

### BY CIRCUMSTANCES

- Recently sold or about to sell a business
- Recently came into or about to come into an inheritance
- Affected by another major financial event and needing to reduce a tax burden



## Talking about charitable giving



*“Parents should  
leave children  
enough money so  
they would feel  
they could do  
anything but not  
so much that they  
could do nothing.”*