



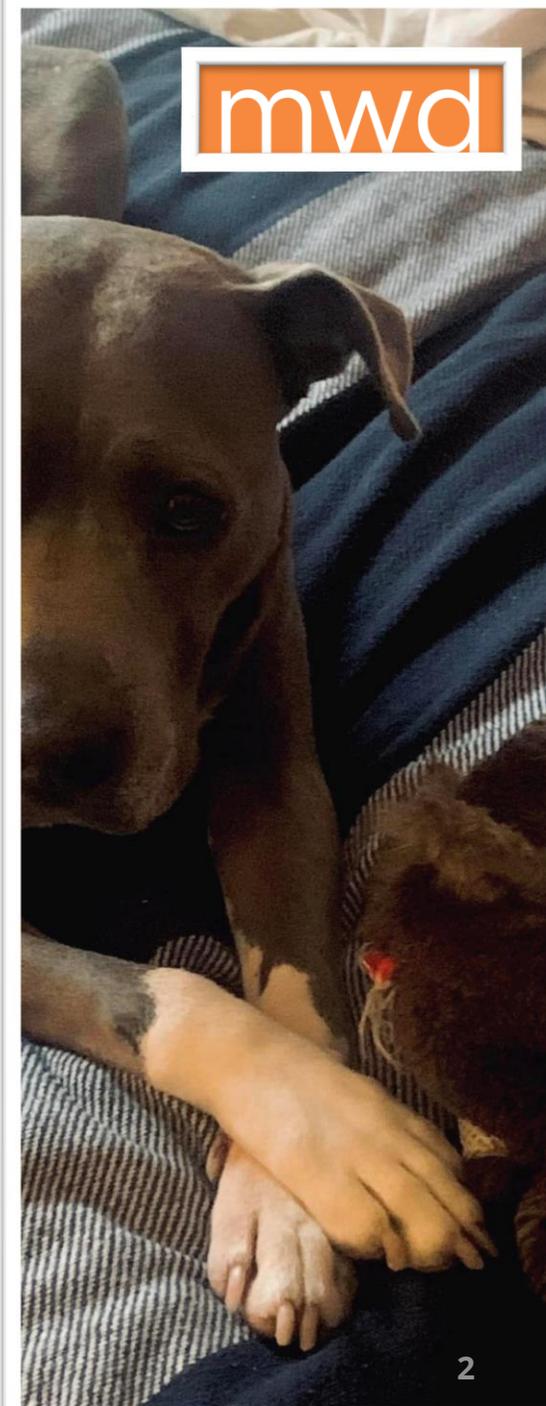
Legacy Propositions

PLANNED GIVING DAY
OCTOBER 12, 2022



Quick intro...

- ❖ I'm Tracy!
- ❖ I fell into fundraising after too many paychecks from my first job (community organizer) bounced. Figured someone needed to raise the money!
- ❖ I've worked in planned giving/major gifts, primarily in the social justice/advocacy space, for most of my career (25 years), with a quick side quest into law (securities litigation). That didn't last long.
- ❖ 5 years ago, I moved into consulting, launching the legacy marketing division at Mal Warwick Donordigital (an employee-owned B-Corp), an integrated fundraising agency.
- ❖ My spouse is an illustrator, my kid is a 14-year-old math-obsessed animal rights activist, and my dog is a big sweet pitbull rescued after five years chained up. He meanders onto most of my Zoom calls.
- ❖ The last time I interviewed a donor, we ended up talking for two hours longer than planned about knitting, gardening, and protesting, all hobbies we had in common.



Agenda

What is your “why”?

Elements of a good proposition and related messages

Images/creative

Mind-mapping: Great tool for thinking through your message

Testing

Example: Re-envisioning CHOP’s legacy program

What is your “why”?

- ❖ What is the need you were founded to address?
- ❖ Progress you've made and where you need to go
- ❖ How you'll get there
- ❖ Why legacy gifts make that possible
- ❖ Risks if you DON'T get those gifts
- ❖ How does it reflect your donors' “why”?
- ❖ What are the best messages and for whom?



Why it's important

- ❖ Interest in planning/legacy giving at a high. But that interest isn't evenly distributed across charities.
- ❖ Competition: Donors support 10+ charities during life, consider 5 or 6 for a legacy gift, and include perhaps 3
- ❖ A donor will exclude their favorite charity if they believe another charity needs the gift more
- ❖ Increasingly, they are NOT sharing their consideration or their gift intention with charities
- ❖ Need to supercharge your case

Competition

Recent UK example:

- Of people who donated to Cancer Research UK and Marie Curie (end of life care), 42 per cent said they would consider leaving a gift only to CRUK, while 12 per cent said they would leave a gift only to Marie Curie. The remaining 44 per cent said they would consider leaving money to both.
- People who said they would give to Marie Curie and not CRUK cited its work in their local community; those who preferred CRUK said it was because they understood the charity's work, it was always in the news and they believed it was working on a problem that needed to be solved.

Recent MWD focus groups:

- Longtime, engaged, loyal midlevel donors.
- When asked "if you had to put only one organization in your will right now, which one?" – very few picked the current organization! In the top 3 for consideration, but if a decision needed to be made right then, our client would not have made it in.

Elements

INCLUDE

- Fundable
- Urgent
- Credible
- Inspirational
- Tangible
- Clear timeline (30 years)
- Personal
- Images that help carry the story

(courtesy of R. Radcliffe)

AVOID

- Impossible to achieve
- Too generic or boring to be urgent: “Legacy of Hope” or “ensure our work for future generations”
- Technical gift details
- Too much about org, not enough about donor
- Stock pictures of old people

Show need

- ❖ Larger organizations may need to address the perception that they have lots of money and only need large legacy gifts.
- ❖ How does your work best address the need?
- ❖ What need is realized bequest revenue currently meeting?
- ❖ What will not happen if you don't continue to receive (increase) these funds?
- ❖ Ask your donors: "Do you understand why gifts in wills are so necessary for us?"

Don't be boring

- ❖ “Create a legacy for future generations” has no real meaning anymore.
- ❖ You need specificity:
 - ❖ Gifts in wills fund 1/3 of our research to xxxx.
 - ❖ Gifts in wills fund ¼ of our endangered habitat protection work.
 - ❖ Gifts in wills fund supportive care services that insurance won't cover, ensuring no one here faces cancer alone.
 - ❖ Use specific language: Wills, not legacy

Relationship/benefit

- Donors who feel a personal connection with the organization more likely to include you.
- One reason donors shift beneficiaries later in life, as they interact with or benefit from different organizations (hospital, hospice)
- Or as they feel less valued by other organizations
- You can't always identify the relationship –
 - Example: friends of patients
 - But can be just as strong as identifiable ones

Families come first for younger donors

- ❖ As donors get to their later 70s/80s, worries about outliving assets, future family needs, etc., are not as immediate. Autobiography, values, what we leave behind more relevant.
- ❖ But for “younger” donors (age 50-70), family is very much top of mind and uncertainty about the future is fairly universal. They aren’t ready to look back or ponder how they want to be remembered; they are very much worried about the future.
- ❖ They truly don’t realize that they don’t have to choose between family and charity (and family is expansive – it’s not just kids/grandkids).
- ❖ None of us know what the future holds
- ❖ You can name a charity as a contingent beneficiary (retirement plan in particular). That way, we don’t receive anything if your family needs it.
- ❖ Or, a small percentage of what’s left after your family is cared for will never take away from your family’s needs and the amount adjusts automatically.
- ❖ Did you know that you can leave 99% of your assets to your loved ones and just 1% to charity?

Memories for older donors

“Asking people to think about causes they feel passionate about makes them reflect on their life stories. It is highly emotive territory.

To think about causes I am passionate about evokes strong memories – of a premature baby being cared for in hospital, of a well-loved family pet, of a friend faced with a life changing diagnosis, of losing a loved one someone suddenly and unexpectedly.

These are things I place a huge value on. And each situation has a charity I will associate it with. So by reminding me about these causes when I am making my will, I will open my heart and open my wallet.” - Legacy Voice UK

A picture is worth 1000 words

- Older people see themselves as younger, more active, and vital – avoid generic “old folks” images. They also like to see potential – why images of young people test so well
- No stock images. They’ve seen them all and can recognize one a mile a way. And particularly no stock images of body parts!
- Generally, face forward, clean composition. Depending on mission, animal/landscape/built environment photo may be more appropriate. Whatever shows the story best
- Donor pics only if connected to a compelling story about their “why”; even better if they have a relationship that led to their gift; candid rather than posed pictures
- Focus on those who are most impacted by the work
- Push back with marketing on branding elements that don’t work for older adults
- More upbeat imagery is preferable, but sometimes more negative images can inspire action, depending on your mission (example: PETA)
- Concerns: donor basis (racism, homophobia, etc.)



Please don't...



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... and mind and bo
to be my last will and testament
... place and stead in
... with

Images



Obvious and perfect!



< the winner for one client! Former patient, now a nurse on the floor where she was treated.

> Donors: candid personal photo, not formal or stiff. 4 people may be too much but eye is still drawn to center

Not perfect, but their determination and story dovetails with mission



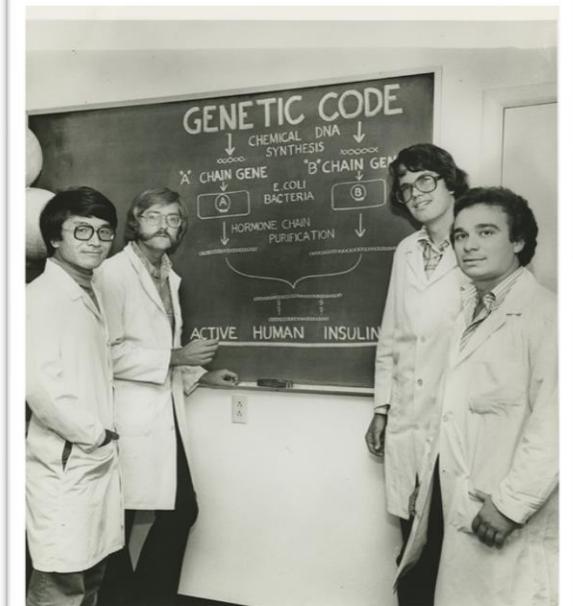
Group picture – too visually busy with no clear subject



// THESE WOMEN UNDERSTAND THE IMPORTANCE OF LAND AND THE IMPORTANCE OF HAVING IT FOR THE NEXT GENERATION. //

DAM CHANTHY, DIRECTOR OF OXFAM PARTNER THE HIGHLAND ASSOCIATION

Aiming for reminder of past breakthroughs setting the stage for future ones, but donors did not like it.



Powerful language

- ❖ Strong, emotional words that trigger action:
 - ❖ Fear: shatter, insidious, frightening, pain, worry, scared
 - ❖ Encouraging: life-changing, triumph, audacious, courage, defiance, unleash
 - ❖ Safety: secure, trust, reliable, resolute, commitment

Not so strong

- ❖ Want, seek, hope, try, aspire

mwd

MALWARWICK - CONCEPTUAL

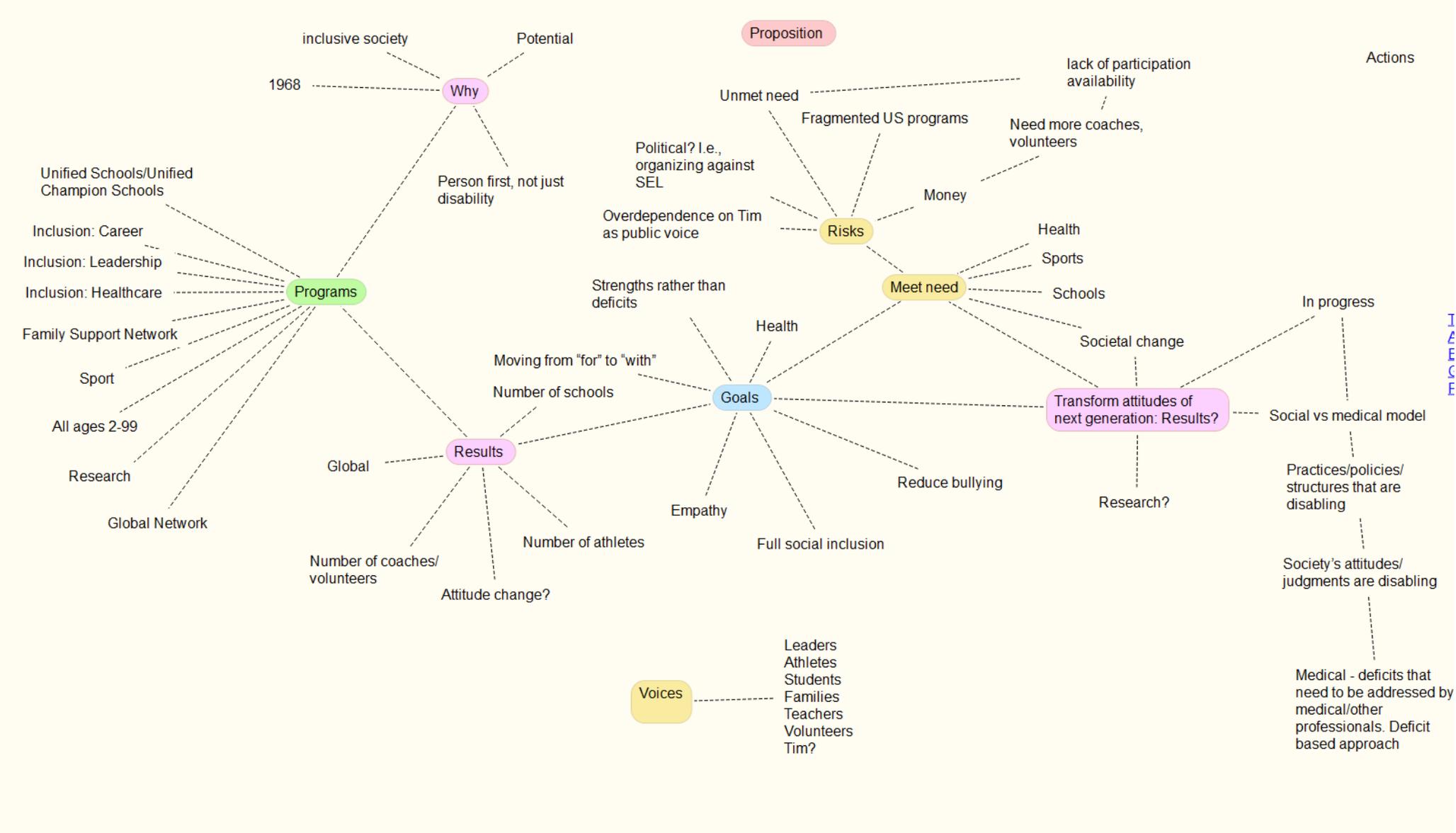
**Until all
energy is
clean**

never rest

Make the fight for a better
future part of your life story
[Learn More](#)

 **EARTHJUSTICE**

Tools: Mind-mapping



Get input

- ❖ Proposition may be different for different donors
- ❖ How you use it may vary by channel, CTA ,etc.
- ❖ Look at the action you want to inspire, rather than simple likes/dislikes.
- ❖ Be sensitive to your main stakeholders
- ❖ Focus groups
 - ❖ Surveys
 - ❖ Market research
 - ❖ Interviews
 - ❖ Legacy donors
 - ❖ Partners
 - ❖ Beneficiaries
 - ❖ Program staff

Market research/message pre-testing Special Olympics (in progress)

1. First, we are defining 4 possible approaches
2. Then will choose an example photo for each
3. Short copy – 50 words (why, connected with approach/photo)
4. Testing across people, age 50+, through market research platform, rather than audience research.
5. After we analyze results and feedback, will test with organization donors through “ad survey”
6. Market research – many bequests arrive from people who are NOT in the CRM

Ad Survey- City of Hope

- Created an “ad survey” campaign to put different concepts in front of supporters
- Not only did it generate extremely detailed and helpful information, but it also triggered disclosure of 14 gift intentions and 89 qualified leads!
- Feedback from first test led us to de-emphasize donor pictures/stories
- Useful feedback on branding as well – organization recently rebranded and updated the elements that most of the respondents had trouble with



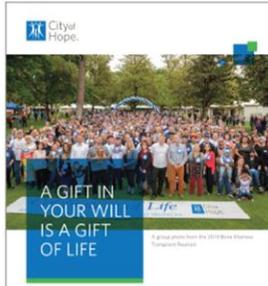
Which One Would You Choose?

<Donor Name>
<Address Line 1>
<Address Line 2>
<City>, <State> <Zip>

Thank you for taking the time to share your opinion. Please share your feedback on each of the four advertisements. To share your feedback online, please visit myplanwithco.org/2022adsurvey

For each advertisement, please indicate, on a scale of 0 to 5, how much you agree with statement. (Select one for each row.)

2.



A GIFT IN YOUR WILL IS A GIFT OF LIFE

More than 17,000 bone marrow transplants have been performed at City of Hope. Transplant recipients and their families continue to gather and celebrate the gift of life virtually at the annual Bone Marrow Transplant Harvest.

A gift in your will is a gift of life to future bone marrow transplant recipients who will have the chance to live longer, better and more fully.

To include a gift in your will to City of Hope, simply contact your attorney to determine the best way to update or make your plan, or visit myplanwithco.org/financing to request more information.

800-232-3314 | planning@cityofhope.org | CityofHope.org

3. Advertisement 3: A GIFT IN YOUR WILL COULD FUND THE NEXT BREAKTHROUGH TREATMENT. Arthur Riggs, Ph.D., the Samuel R. Kistler Distinguished Chair in Diabetes & Endocrinology, is a world-renowned expert in molecular biology and genetics whose work has changed the lives of diabetics worldwide.

4. Advertisement 4: A GIFT IN YOUR WILL HELPS ENSURE THAT OUR HISTORY OF COMPASSIONATE PATIENT CARE CONTINUES. Samuel H. Collier, one of City of Hope's early leaders, shared: "There is no greater joy on earth than to see a patient, in the process, we desire the good. These words remain City of Hope's motto."

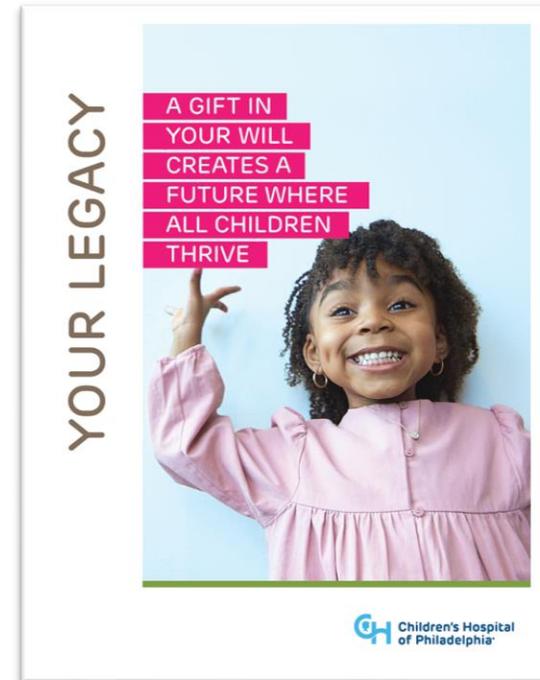
Please share a little more about yourself:

- Please tell us about your relationship to City of Hope.
 - I was/am being treated at City of Hope.
 - I am a relative of someone who was/is being treated at City of Hope.
 - A friend or family member has been touched by serious illness.
 - I have been touched by serious illness.
- We hope our ads will inspire our supporters to learn more about the impact a gift in their will has on our mission. Have you included or would you consider including a gift in your will for City of Hope?
 - I have included a gift for City of Hope in my will or trust, or by beneficiary designation.
 - I intend to include a gift in my will for City of Hope.
 - I am considering including a gift in my will for City of Hope.
 - I do not think I will include a gift in my will for City of Hope.
- Please send me a copy of *Imagine a World Without Cancer — Your Gift for the Future*, so I can learn more about ways to create my own legacy.
 - Yes

Survey continues on back

Children's Hospital of Philadelphia

- Reimagining legacy giving program
- Updating case, language, creative
- Simplify online presence to important basics
- Center kids' stories
- Focus more on why, less on how
- Still more to do!



YOUR LEGACY

A GIFT IN
YOUR WILL
CREATES A
FUTURE WHERE
ALL CHILDREN
THRIVE

Children's Hospital of Philadelphia

Make a Gift to CHOP in Your Will or by Beneficiary Designation

Provide Happy, Healthy Tomorrows for Children Everywhere

[Download Our Brochure](#)

Many Children's Hospital of Philadelphia (CHOP) supporters have chosen to include a gift in their will or through an IRA or other beneficiary designation. You can see the impact of these legacy gifts at CHOP in the hopeful faces of families, the resilient spirits of our young patients, and in the fierce determination of our researchers to find cures.

When you include a gift to CHOP in your will or through a beneficiary designation, you help fund pioneering research to fund cures for pediatric illnesses, child- and family-centered care and support services, community health and early intervention services to prevent illness, and state-of-the-art facilities. Your gift will help give the children and families who will need us in the future their best chance to fulfill their potential.

Learn more about creative ways to invest in CHOP's future that are simple and flexible and help you accomplish both your long-term financial and charitable goals. For more information, contact Lizbeth Macoretta, Director of Planned Giving, at 267-426-6472 or MacorettaL@chop.edu

We Are Here to Help

Our team of gift planning experts welcomes the opportunity to help you explore your charitable gift planning options. Please contact us:

Children's Hospital of Philadelphia Foundation - Office of Gift Planning
Lizbeth Macoretta, Director of Planned Giving
3400 Civic Center Blvd., Philadelphia, PA 19104
267-426-5332
MacorettaL@chop.edu

If you are an executor, attorney, or estate administrator, please contact: Liz Macoretta at 267-426-5332 or MacorettaL@chop.edu.



A Gift in Your Will
Help us understand your wishes to support sick kids.
[Learn More](#)

The Lewis Society
A caring community of cherished partners.
[Learn More](#)

Gifts by Beneficiary Designation
Ensure a lasting legacy for generations of children.
[Learn More](#)

Summary

- Since 1855, Children’s Hospital of Philadelphia has remained focused on its vision: to make sick children well and to secure a healthy future for families.
- Over the years, many supporters have included a gift in their will to help children they would never meet, yet we see the impact of these caring legacies every day in the hopeful faces of families, the resilient spirits of our young patients, and in the fierce determination of our researchers to find cures.
- Your gift will help CHOP find cures for chronic and fatal pediatric illness; prevent disease through early interventions, healthy communities, and health advocacy; and continue to offer family-centered care to support the emotional health and well-being of children, families, and caregivers.
- A gift in your will ensures that Children’s Hospital of Philadelphia will remain a beacon of hope — where research leads to cures, parents find the best care for their children, and no family faces serious illness alone.
- Lewis Society members represent a caring community of cherished partners who share a common vision – a healthy future where children and their families can thrive. CHOP offers Lewis Society members connection, community, and recognition through meaningful program updates, invitations to special gatherings, and the opportunity to inspire others’ generosity.

CHOP – Wills outreach

YOUR VALUES

Your commitment to Children's Hospital of Philadelphia reflects your values — that all children deserve a healthy future and the opportunity to thrive.

Since 1855, Children's Hospital of Philadelphia has remained focused on its vision: to make sick children well and to secure a healthy future for families. Over the years, many supporters have included a gift in their will to help children they would never meet, yet we see the impact of these gifts every day in the hopeful faces of families, the resilient spirits of our young patients, and in the fierce determination of our researchers to find cures. These caring legacies continue to save lives every day. When you include a gift in your will, this becomes a part of your enduring legacy.

A gift in your will ensures that Children's Hospital of Philadelphia will remain a beacon of hope — where research leads to cures, parents find the best care for



INCLUDE A GIFT TO CHOP IN YOUR WILL OR TRUST, OR BY BENEFICIARY DESIGNATION

Many CHOP supporters have included gifts in wills or trusts, through beneficiary designations, or other types of planned gifts to help us fund the wide range of our work:

- Pioneering research to find cures for pediatric illnesses
- Family-centered care and support services
- Community health and early intervention services to prevent illness
- State-of-the-art facilities that enable us to provide exceptional care

Most importantly, they fund the future. A future where children thrive.

Creating or updating your will and beneficiary designations doesn't have to be complicated:

- Think about the loved ones and causes you'd like to support.

SAM IS AN ACTIVE, HEALTHY BOY WHO LOVES TO PLAY THE TRUMPET. But he was diagnosed before birth with a serious, life-threatening birth defect. Seeing the impact philanthropy had on their son's life, from his birth in the Garbose Family Special Delivery Unit to his surgery and two-month stay in the Harriet and Ronald Lassin Newborn/Infant Intensive Care Unit, inspired his parents, Ryan and Megan, to leave a percentage of their estate to CHOP.

"We want to help sustain these services down the road to ensure that other families can have the same success we did. And we want to set an example for our children that money is powerful if it's used in the right way."



You can leave most of your resources to your loved ones and reserve a percentage for Children's Hospital of Philadelphia. **Every gift, in any amount, matters. Every gift can change the future for a sick child.**

We know that your plans and circumstances can change, so you can update your plans and your giving decisions at any time.

Consult your attorney or advisor to discuss the best way to

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YOUR LEGACY

A GIFT IN YOUR WILL CREATES A FUTURE WHERE ALL CHILDREN THRIVE



Zion and his sister, Zuri, are exuberant, outgoing children who have sickle cell disease and have been patients of Children's Hospital of Philadelphia (CHOP) since birth. CHOP researchers are investigating new ways to treat and potentially cure children like Zuri and

IMPORTANT INFORMATION FOR YOUR GIFT

If you would like to designate your gift to a particular purpose, such as general research, a specific program, a CHOP location or for any other reason, please contact us so we can help you determine the best way to meet your philanthropic vision.

To include a gift in your will or make a gift through a beneficiary designation, you will need our legal name and Tax ID number:

Children's Hospital of Philadelphia Foundation
3401 Civic Center Blvd.
Philadelphia, PA 19104
Tax ID #23-2237932

TRIBUTE AND MEMORIAL GIFTS

If there is someone who has inspired you to include a gift to CHOP in your plans, we can recognize your gift in honor or in memory of this special person.



IN 1995, ABIGAIL LACKMAN WAS BORN AT CHOP, where fetal medicine pioneers N. Scott Adzick, MD, MMM, and Lori J. Howell, DNP, MS, RN, had recently arrived to establish one of the nation's first fetal diagnosis and treatment centers.

Before her premature birth, she had already undergone several fetal procedures for a life-threatening birth defect of her lungs. Her early years were a roller coaster of procedures.

But 26 years later, Abby wrote a note to Dr. Adzick:

"I was a patient of yours almost 26 years ago... I wanted to personally thank you for everything because I would not be here today without you. Now, I am healthy and working in my dream job as an ICU nurse in the hospital that saved me."

AT YOUR SERVICE

For assistance in crafting your personal legacy, for more information, or to notify us that you have left a gift for Children's Hospital of Philadelphia in your will, please contact Elizabeth Macoretta, Director of Planned Giving.

Office of Planned Giving
Children's Hospital of Philadelphia Foundation
3401 Civic Center Blvd.
Philadelphia, PA 19104
267-426-6472
MacorettaL@chop.edu



THE LEWIS SOCIETY

From our earliest bequest gifted by the father of CHOP's co-founder, Dr. Francis West Lewis, to the many supporters since then who have included CHOP in their estate plans, these gifts — some large, some small, but all deeply meaningful — have saved countless lives.

Children's Hospital of Philadelphia honors those who have created a gift for us in their wills or trusts, or by beneficiary designations by welcoming them into the Lewis Society. This special community of supporters believes that establishing a legacy gift for CHOP is one of the most effective ways to secure a healthy future for children and families — and we are grateful.

CHOP expanded brochure



NORDIGITAL

A BETTER FUTURE FOR HEALTHY CHILDREN STARTS HERE

Michelle, at six weeks old, is shown here with her parents, Angel and Larissa, and her CHOP neurologist, John Brandeems, MD. Michelle was born with spinal muscular atrophy, but a gene therapy she received at CHOP halted the disease's progression and gave her a bright future.

name CHOP as a beneficiary of your retirement plan or other account, you join a community of our most dedicated supporters committed to a world where all children thrive.

You will help ensure that Children's Hospital of Philadelphia remains a beacon of hope — where research leads to cures, and families find the best care for their children.

While there are many names for gifts that come to CHOP after your lifetime — legacy giving, deferred giving, planned giving — each gift represents the continuation of your philanthropy for future generations. We are here to help.

RIGHT: A hospital clinic featured immaculate, then state-of-the-art facilities and, as always, a focus on child and family.

SINCE OUR START IN 1855, CHOP HAS BEEN THE BIRTHPLACE FOR COUNTLESS BREAKTHROUGHS AND DRAMATIC FIRSTS.



SAM'S STORY

THE GIFT OF A HEALTHY CHILD AND THE PROMISE OF HOPE FOR OTHERS



Sam was born with a birth defect that limited his lungs' growth. Today, he is an active 11-year-old who plays the trumpet and enjoys sports.

IMAGINE FINDING OUT that your first child will be born with a life-threatening condition: a severe birth defect in which their abdominal organs move up into their chest, threatening the growth of their lungs as they develop in the womb.

Megan and Ryan Fox lived through that anguish and found hope and help at Children's Hospital of Philadelphia's Richard D. Wood, Jr. Center for Fetal Diagnosis and Treatment. Because of the care he received, their son, Sam, is now an active 8th-grader who plays the trumpet, basketball, and tennis.

With this life-changing experience still

both in their 40s, decided to give a percentage of their estate to CHOP through a gift in their will. They could see the impact philanthropy had on their son's life, from his birth in the Carbow Family Special Delivery Unit to his surgery and two-month stay in the Harriet and Ronald Laska Newborn/Infant Intensive Care Unit.

"We want to help sustain those services down the road to ensure that other families can have the same success we did," says Ryan. "And we want to set an example for our children that money is powerful if it's used in the right way."



Hay, age 3, is treated at CHOP for hypoparathyroidism, a genetic disorder in which the parathyroid secretes too much insulin. The Congenital Hypertrophic Pyloric Stenosis Center has treated more than 1,000 children — making it the largest and most active hi center in the world.

YOUR LEGACY

A GIFT IN YOUR WILL CREATES A FUTURE WHERE ALL CHILDREN THRIVE



Children's Hospital of Philadelphia

start in 1855, CHOP has birthplace for countless toughs and dramatic firsts in medicine. Commitment to improving the all children has remained for more than 165 years. vision: to make sick well and to secure a future for families. To include a gift to CHOP in your will or trust, or when you

GIFTS YOU MAKE BY SIGNING YOUR NAME

Many assets can be used to make a meaningful gift to CHOP. You do not need to update your will; you can express your values simply by signing your name, and you have the flexibility to change your beneficiary designations at any time.

These assets include:

- **RETIREMENT PLANS.** Including your IRA, 401(k), 403(b), or other tax-deferred plan. If you name CHOP as a beneficiary of all or some percentage of your retirement plan account, you can leave less heavily taxed assets to loved ones, and CHOP will receive 100% of your gift.
- **LIFE INSURANCE POLICIES.** You may decide to name CHOP as a beneficiary of your life insurance policy if it's outlined its original purpose and you no longer need the policy.
- **CERTIFICATES OF DEPOSIT, BANK OR BROKERAGE ACCOUNTS,** and other financial accounts.
- **DONOR-ADVISED FUNDS.** You can designate CHOP to receive funds remaining in your donor-advised fund account after your lifetime.

With each of these gifts, simply ask your retirement plan manager or financial institution for the appropriate beneficiary designation form. Many forms are also accessible on your financial institution's website or through your online account portal.

GIFTS THAT PAY YOU BACK

LIFE INCOME GIFTS, including charitable gift annuities and charitable remainder trusts, help create a hopeful future for children and families while offering income to you and/or a loved one.

A life income gift may be right for you if:

- You would like to make a meaningful gift to support CHOP;
- You would like to create or retain income from the assets you would donate;
- You would like to create a legacy but would appreciate the tax benefits now;
- You would like to provide income to a loved one during their lifetime;
- You would like to make a gift now, but will not need payments until a later time, such as retirement.

Both charitable gift annuities and charitable remainder trusts provide lifetime payments (or for up to 20 years for a charitable trust), offer immediate tax benefits, and allow you to avoid some capital gains taxes if you make your gift with appreciated assets.

At CHOP, you must be 65 or older to receive payments with a charitable gift annuity. Our giving specialists can help you understand each of these gift options and help determine if one of them is the best gift to meet your goals and needs.

FROM VISION LOSS TO 'I CAN SEE IT!'

HANNAH SPENT HER YOUNG LIFE navigating a world where she could see very little and was preparing for a future without sight. But a gene therapy with its origins at CHOP transformed her future completely.

For 20 years, a team of researchers had been pursuing an ambitious goal: treat a rare form of blindness in children — the form Hannah had. The work required resilience and perseverance. The result was the first US Food and Drug Administration-approved gene therapy for an inherited form of blindness.

Hannah, age 7, was born with an inherited condition that was robbing her of her sight. A gene therapy initially developed at CHOP restored her sight, and she now can shoot free throws in her family's driveway and ride a bike around the neighborhood. CHOP's relentless drive for impact has put the hospital at the forefront of medical discovery.

Hannah was the first patient at CHOP to receive the new therapy, called Luxturna. The result? "The summer before she started second grade, Hannah saw a star for the first time. 'I took her outside and said, 'Hannah, can you see that little white light in the sky? That's a star,' I can see it!' She was so happy."

Those breakthrough moments kept happening as the world revealed itself to Hannah, one star, one flower, one sunset at a time.



HANNAH'S STORY

THANK YOU!

You are in no way obligated to do so, but if you have already made a gift to CHOP in your will or trust, or by beneficiary designation, we hope you will let us know. We feel privileged when we get the opportunity to thank people who include Children's Hospital of Philadelphia in their plans. We would appreciate the chance to acknowledge your kindness and welcome you to the Lewis Society. Understanding your wishes also helps us communicate appropriately with you.

OUR PROMISES TO YOU CHOP is committed to maintaining the highest standards of ethics and conducting with the best of your legacy support.

- We will respect your privacy.
- We will respect your right to change your plans.
- We promise to use your gift the way you intend.

To include a gift in your will or trust, or to make a gift through a beneficiary designation, you will need our legal name and Tax ID number: Children's Hospital of Philadelphia Foundation Tax ID #23-237932

If you would like to support a particular program, location, or research, our gift planning team can help.



From our earliest bequest gifted by the father of CHOP's co-founder, Dr. Francis West Lewis, to the many supporters since then who have included CHOP in their estate plans, these gifts — some large, some small, but all deeply meaningful — have saved countless lives.

Children's Hospital of Philadelphia honors those who have created a gift for us in their wills, trusts, or by beneficiary designations by welcoming them into the Lewis Society. This special community of supporters believes that establishing a legacy gift for CHOP is one of the most effective ways to secure a healthy future for children and families — and we are grateful.



Lisabeth Macorella
Director of Planned Giving

ON THE COVER: Zuri, at age 3, receives treatment at CHOP for sickle cell disease. Researchers are investigating new ways to treat and potentially cure the disease.

Children's Hospital of Philadelphia Foundation
Office of Planned Giving
3401 Civic Center Blvd., Philadelphia, PA 19104
267-426-6472 | planned@chop.edu

Highlights

- Patients - Zuri and Zion, Hannah, Huy, Michaela, Sam, Abigail
- Each one represents a different area of CHOP's work
- Patient/child of legacy donors – Sam
- Patient, now a nurse at CHOP, with her doctor - Abigail
- Important Info: legal name, Tax ID
- Named contact and direct contact information
- Statement of family first/revocable gift
- Legacy Society as community, rather than “benefit”
- Sensitivity to audience – avoid framing illness as a “fight” that can always be won.
- Minimal reverse text
- Colorful but very readable, 12pt + font
- Adjusted brand elements that were problematic (i.e., gradients), but overall branding is great to work with.

Next update

- Better define how gifts in wills are used
- More specific direction for addressing family needs
- Badges
- Broader impact: 15,000 doctors trained by CHOP bring exceptional care around the country to many thousands of children
- Utilize stronger power words
- Testing, collect feedback from supporters
- Learn more about how supporters define their relationships with CHOP



In closing

- ❖ Your proposition is unique – remember that no one can do exactly what you do!
- ❖ If your mission has changed over time, you may have an entirely different donor audience with very different motivations
- ❖ It's a process – constantly iterating, updating
- ❖ Don't wait for the “perfect” case: it's fine to start with okay, and keep improving
- ❖ Needs to be versioned/framed for different segments
- ❖ Collect stakeholder feedback but don't make messaging decisions by committee
- ❖ Don't assume – some very counterintuitive messaging may win the day for a large number of supporters: donor-centered may not actually work for some.

Thank you!

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