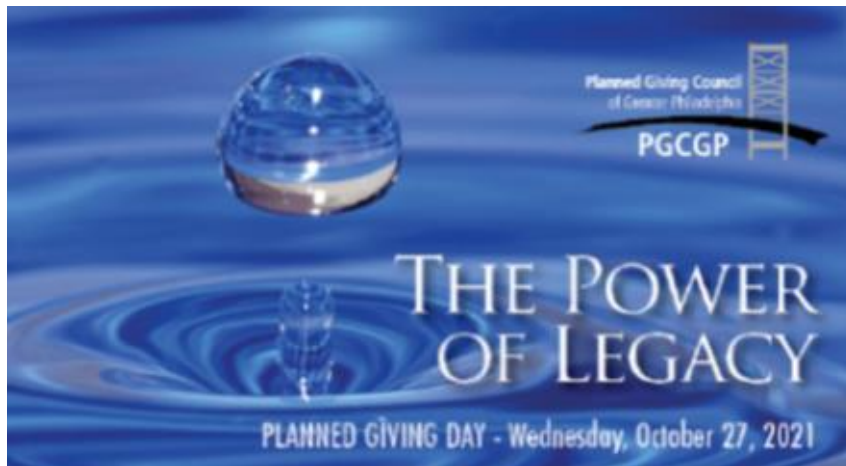


Doing Good and Doing Well: *How to Create a Socially Responsible Approach to Planned Giving*



Mimi Blackwell, JD

Friends Fiduciary

L. Scott Schultz

Schultz & Williams

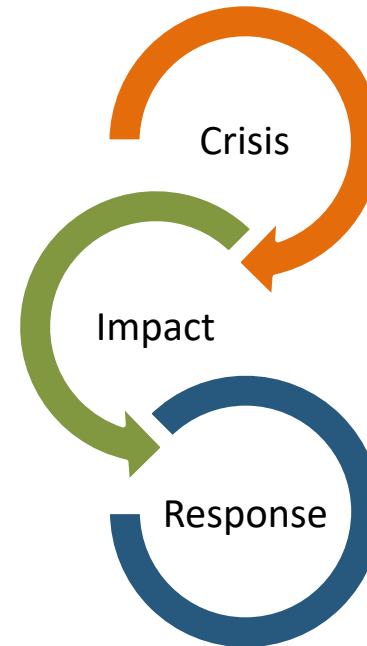
The Landscape

The Crisis Defined

- Market
- Economy
- COVID
- George Floyd Murder
- Divided Nation
- Climate Change

The Impact on Organizations

- Thriving
- Struggling
- Fragile



Opportunity

The Overwhelming Donor Response

- Emotional
- Transactional
- Lifetime Gifts
- Donors as Investors
- Donors Shifting to Impact
- DAFs
- Bequest

Fundraising Opportunity

- Keep Asking
- Double Down on Stewardship
- Building the Case for Endowment
- Gift to Donor Conversion
- Board Giving

危机

"When written in Chinese, the word crisis is composed of two characters -- one represents danger, and the other represents opportunity."
--John F. Kennedy

For All Those Who Want to do Good, Not Just the “*Well-to-Do*”



- Most donors have the **immediate capacity** to create a legacy gift.
- Many deferred giving options have **little or no impact to current income**. Some planned gifts can even **provide additional income**.

Planned Giving as Part of an Overall Development Plan

<p>Planned giving plays an integral role in ensuring the growth and long-term stability of the organization.</p>	<p>Planned giving should be a part of your development efforts, regardless of your organization's size, staffing, mission, age, budget, in-house expertise, or prior giving history.</p>	<p>Unlike annual donations made from available donor income, planned gifts are often inspired by a donor's lasting legacy within the organization.</p>	<p>Donors want to be able to say "yes" to your solicitation. Planned giving vehicles give those individuals a way to give to your organization today.</p>
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Tools of the Planned Giving Trade

- Charitable Gift Annuity
- Charitable Trusts
- Charitable Legacy Funds
- Pooled Life Income Funds
- Donor Advised Funds
- Gifts of Appreciated Securities
- Bequest

Challenges Faced by Organizations

Resources to Support a Planned Giving Program

Multi-state Fundraising Compliance

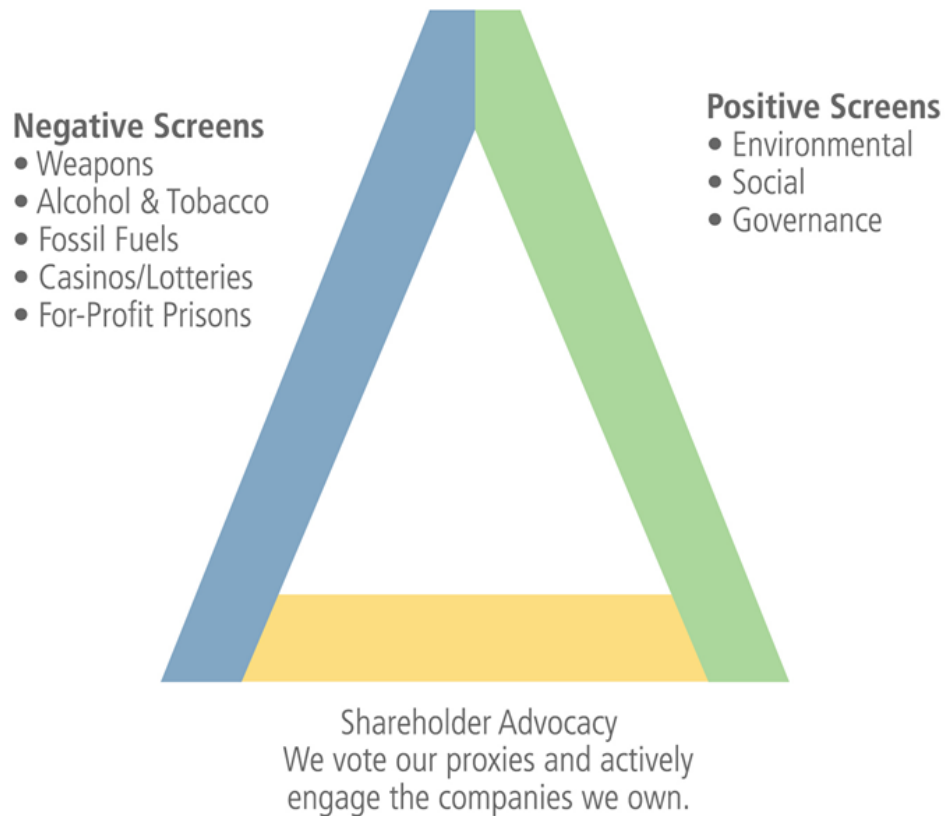
Administration of Long-term & Future Gifts

Donor Perception of Small/Nascent Organizations

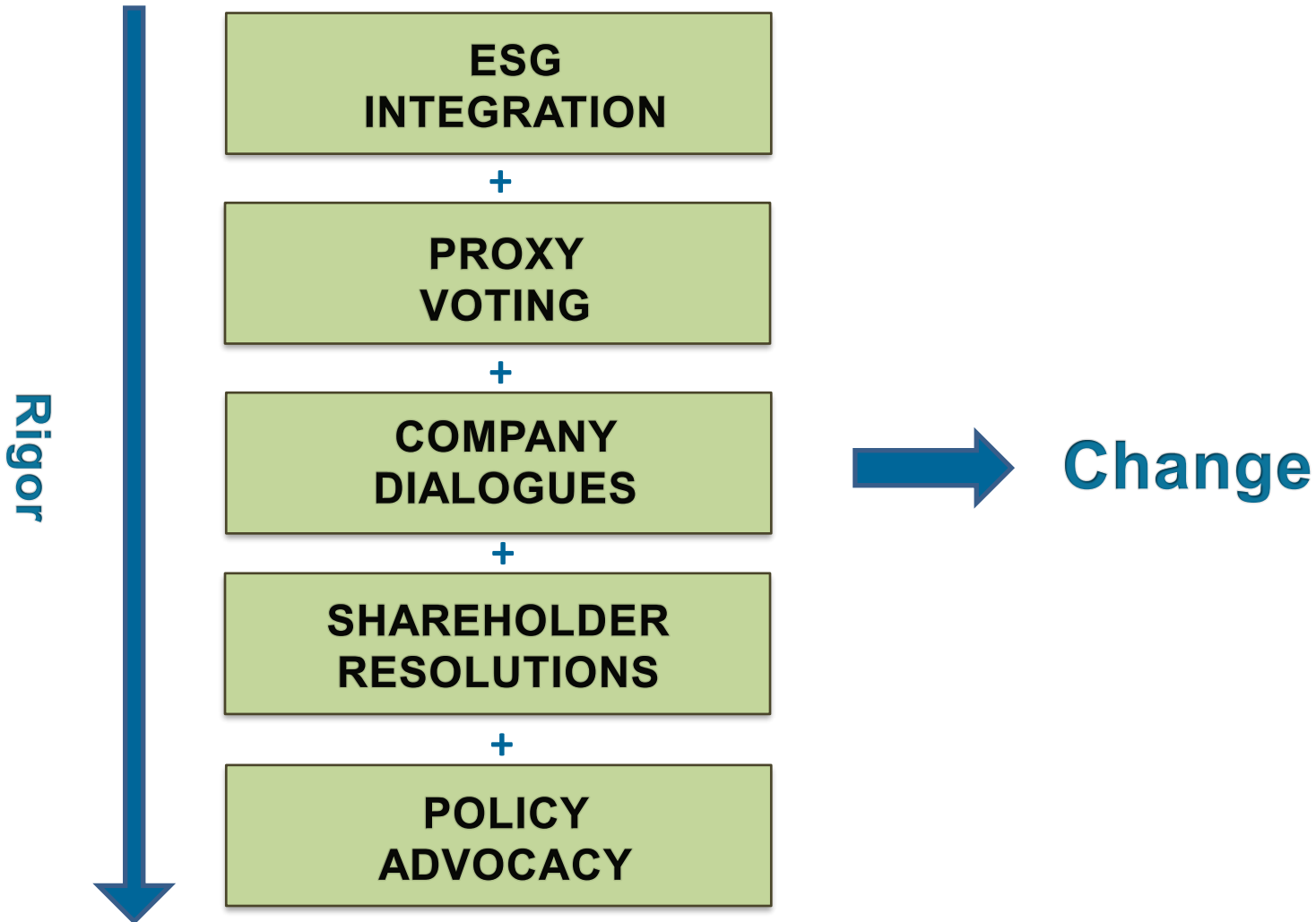
Feeling Lack of Expertise

Investment Management of PG Assets

Socially Responsible Investing



Shareholder Advocacy -- A Lever for Change



Issue Areas

- In 2020-2021, FFC engaged **47** companies on over **20** issues.
- We collaborated with over **25** peer investors and partners.

Environmental

GHG reduction goals
HFC Refrigerant management
Climate action 100+
Renewable energy, energy efficiency
Climate change finance
Deforestation

Social

COVID drug pricing
Surveillance and customer civil and human rights
Just transition
Human rights in supply chains
Human rights and racism in AI – facial recognition
Human rights due diligence
Conflict zones
Smoking in movies

Governance

Lobbying transparency
Proxy voting on climate change
Independent chair
Executive compensation and drug pricing
ESG compensation metrics
Political spending
Climate lobbying
Board diversity

Performance



Quaker Growth & Income Fund – Investment Performance

As of August 31, 2021

	August	YTD	1 Year	3 Year	5 Year	10 Year
Growth & Income Fund: gross	2.16%	13.27%	25.64%	13.17%	12.53%	10.93%
Growth & Income Fund: net ¹	2.09%	12.67%	24.68%	12.33%	11.69%	10.09%
Blended Benchmark ²	1.75%	12.47%	23.50%	11.33%	10.99%	9.76%

Returns greater than one year are annualized.

¹ 2021 net returns based on budgeted investment fees and administrative expenses of 0.79%. The expense ratio has averaged 0.76% for the past five years.

² Blended Benchmark : 30% S&P 500, 9% Russel Mid-Cap, 8% Russel 2000, 20% MSCI ACWI ex-US, 3% MSCI World, 5% FTSE NAREIT, 18% Barclays Aggregate Bond, and 7% Barclays Global Aggregate Bond Indices as of 2/28/21; formerly, 28% S&P500, 9% Russel Mid-Cap, 8% Russell 2000, 25% MSCI ACWI ex-US, 5% FTSE NAREIT, 18% Barclays Aggregate Bond, and 7% Barclays Global Aggregate Bond Indices.



How to evaluate a Planned Giving Partner

- Do you provide Planned Giving administration and/or Investment Management Services?
- Do you offer socially responsible investing options?
- How do you determine which investment(s) would be suitable for my organization?
- Do you have account minimums?
- Are there penalties for withdrawal?
- What are your (long term (3, 5 & 10 year) NET performance compared to a benchmark?
- What are your Investment fees and what do they include?
- What other services do you offer and are there fees for those services?