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Planned Gifts May Offer Growth Opportunity for Fundraising Programs

Study Funded by Campbell & Company at the Center on Philanthropy at Indiana University Analyzes Charitable Bequests

CHICAGO, May 1, 2007— The best planned gift prospects are the large pools of current donors between the ages of forty and sixty finds a report by the Campbell & Company Scholar at the Center on Philanthropy at Indiana University in a study of 2005 data.

As reported in *Giving USA 2006*, charitable bequests totaled \$17.44 billion in 2005, only about 7% of \$260 billion in total U.S. charitable giving. Furthermore, charitable bequests have not shown the same growth as other types of giving. These statistics warranted a closer look at bequest giving. Among the findings in the report:

- Few individuals who currently give to charity have a gift to charity named in their will.
- One in three respondents who did not have a charity named in their will indicated that they would be willing to consider adding one.
- Those most likely to consider adding a planned gift to their will are aged forty to sixty, hold at least a bachelor's degree, and are motivated both by "doing good" and "doing what is expected."

Also noteworthy was the relationship between planned gifts and giving during a lifetime. Among those findings:

- Individuals with a charity named in their will donated more than twice as much annually, more than \$2,000 on average, than those who do not have a charity named in their will.
- Individuals who would *consider* naming a charity in their will also gave on average about \$500 more than those who would not consider naming a charity in their will.

This suggests that annual giving may be an indicator of the willingness to consider a planned gift.

Data from surveys of over two thousand households collected by the Center on Philanthropy in studies of regional giving were examined and compared to a national survey of over 1,000 households of high net worth individuals conducted by the Center on Philanthropy for Bank of America. The complete planned giving study including recommendations for fundraisers is available upon request.

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About Campbell & Company

Campbell & Company is a national consulting firm offering advancement planning, fundraising, marketing communications and executive search for nonprofit organizations in education, health and medicine, arts and culture, environment, social service, and professional societies.

Through thirty years and thousands of engagements, Campbell & Company has helped nonprofit organizations anticipate and manage the challenges of the philanthropic marketplace. Campbell & Company's offices are located in Chicago, Boston, Cleveland, Los Angeles, Phoenix, Portland, the San Francisco Bay Area and Washington, DC. For more information, please telephone 866-957-0000 toll-free, email info@campbellcompany.com or visit www.campbellcompany.com.

About the Center on Philanthropy at Indiana University

The Center on Philanthropy at Indiana University is a leading academic center dedicated to increasing the understanding of philanthropy, improving its practice, and enhancing participation in philanthropy through research, teaching, public service and public affairs programs in philanthropy, fundraising, and management of nonprofit organizations. A part of the IU School of Liberal Arts at Indiana University Purdue University Indianapolis (IUPUI), the Center operates programs on the IUPUI and IU Bloomington campuses. For more information, please email adrldavi@iupui.edu, telephone 317-278-8972, or visit www.philanthropy.iupui.edu.

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