



The Golden Age of Planned Giving Beckons

Giving Institute Summer Symposium 2023



Planned Giving

The Last Philanthropic Frontier



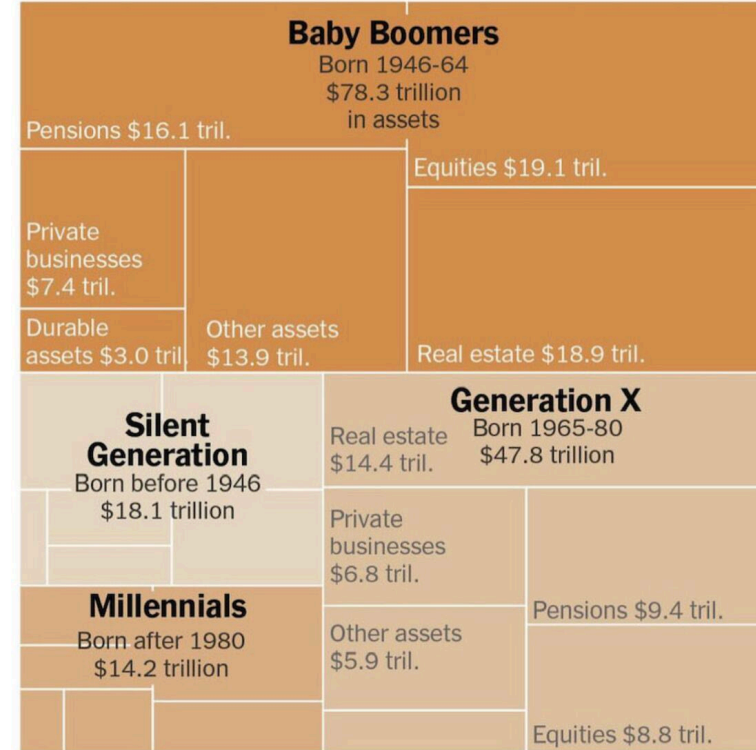
Intergenerational Wealth Transfer

How much wealth is expected to be transferred to nonprofits in the next 20 years?

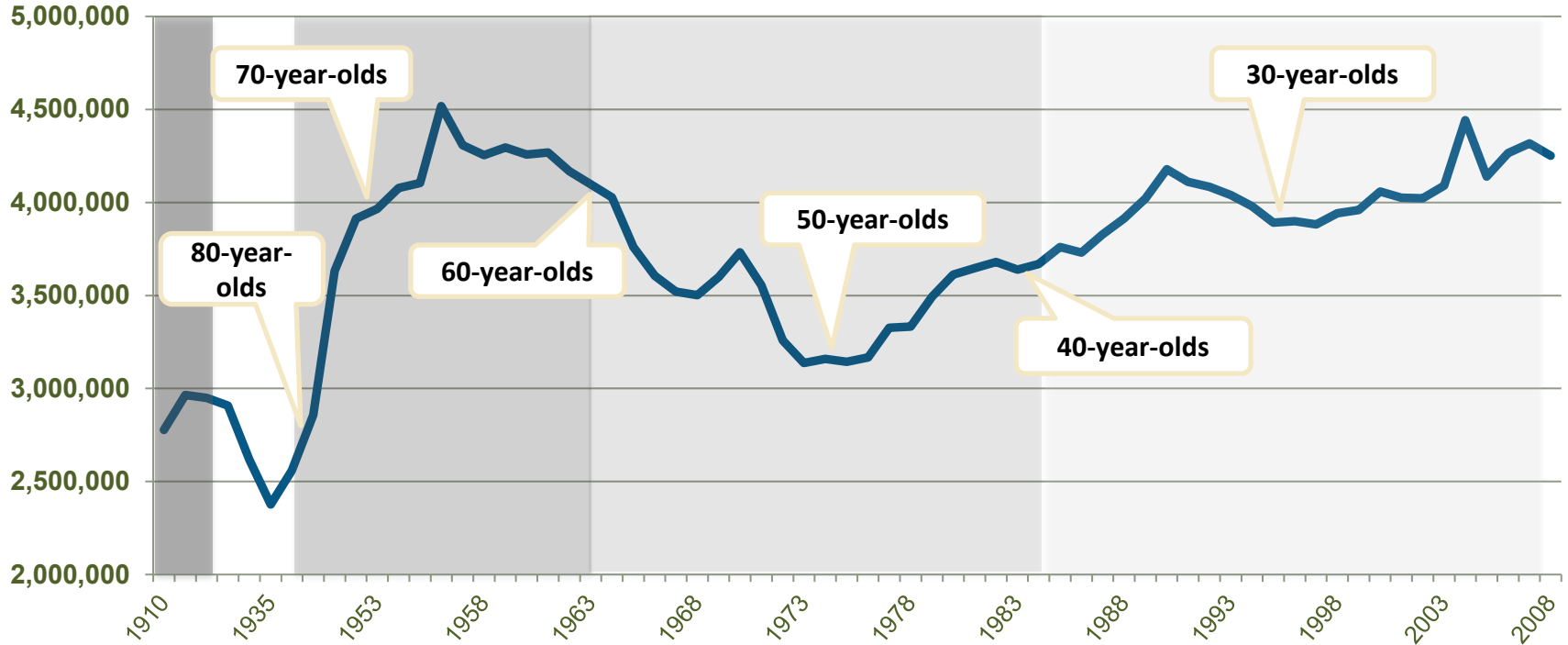
Intergenerational Wealth Transfer

- In 20 years, ~ \$84.4 trillion will be transferred from the Silent Generation and Baby Boomers
 - ~ \$72.6 trillion to heirs
 - ~ \$11.9 trillion to charities

Baby Boomers Hold Half of the Nation's \$140 Trillion in Wealth

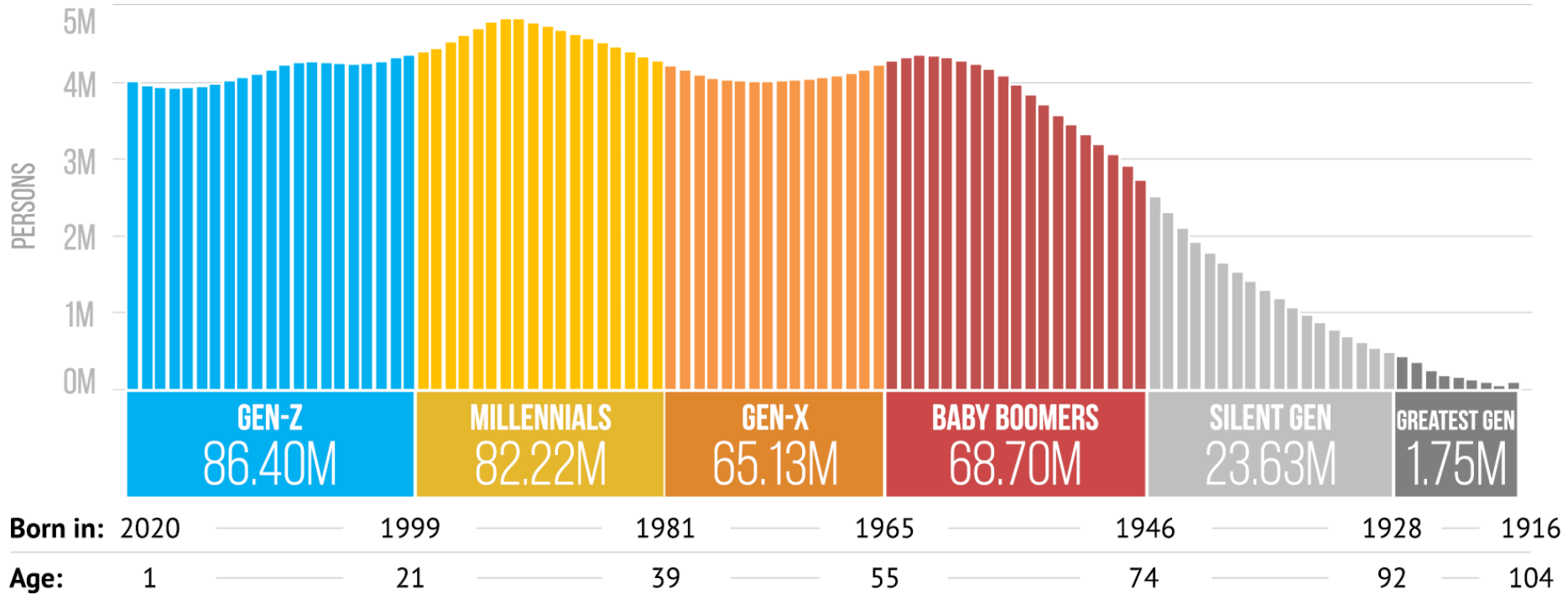


The Influence of Generation



Total US Population by Age and Generation

As of 2020





Combined Wealth of Silent Generation & Baby Boomers

\$96.6 Trillion

- Equities (\$24.4 trillion)
- Real estate (\$23.6 trillion)
- Pensions (\$18.1 trillion)
- Other assets (\$18 trillion)
- Private businesses (\$8.8 trillion)
- Durable assets (\$3.7 trillion)



Helping Nonprofits Secure Planned Gifts

Steps Consultants Can Take to Ensure \$12 Trillion in Charitable Gifts

- Help nonprofits make the planned giving business case
- Help design planned giving programs
- Integrate planned giving into our daily work
- Push multichannel planned giving marketing
- Embrace complexity



What You Can Do Right Now!

Please get involved with the RIFT Project

- Release IRA Funds Timely (RIFT) Project
 - Recent Charitable Gift Planners survey—43% of organizations experience difficulties collecting beneficiary proceeds from one or more IRA administrators
 - [IRA Distribution Resource Center | CGP \(charitablegiftplanners.org\)](https://charitablegiftplanners.org)



Action is expensive, but
inaction costs a fortune.



{GOOD}

benefactor

{DOER}

In a word, it's who we are.
We serve those who serve the common good.
But our approach is anything but common.