

Bridge  
Conference



*Marketing.  
Fundraising.  
It's All Here.*

# Moving Donors up the Pyramid for Maximum Results

Presented by:

Tiffany Neill, CFRE

Lisa Maska, CFRE

Lautman Maska Neill & Company

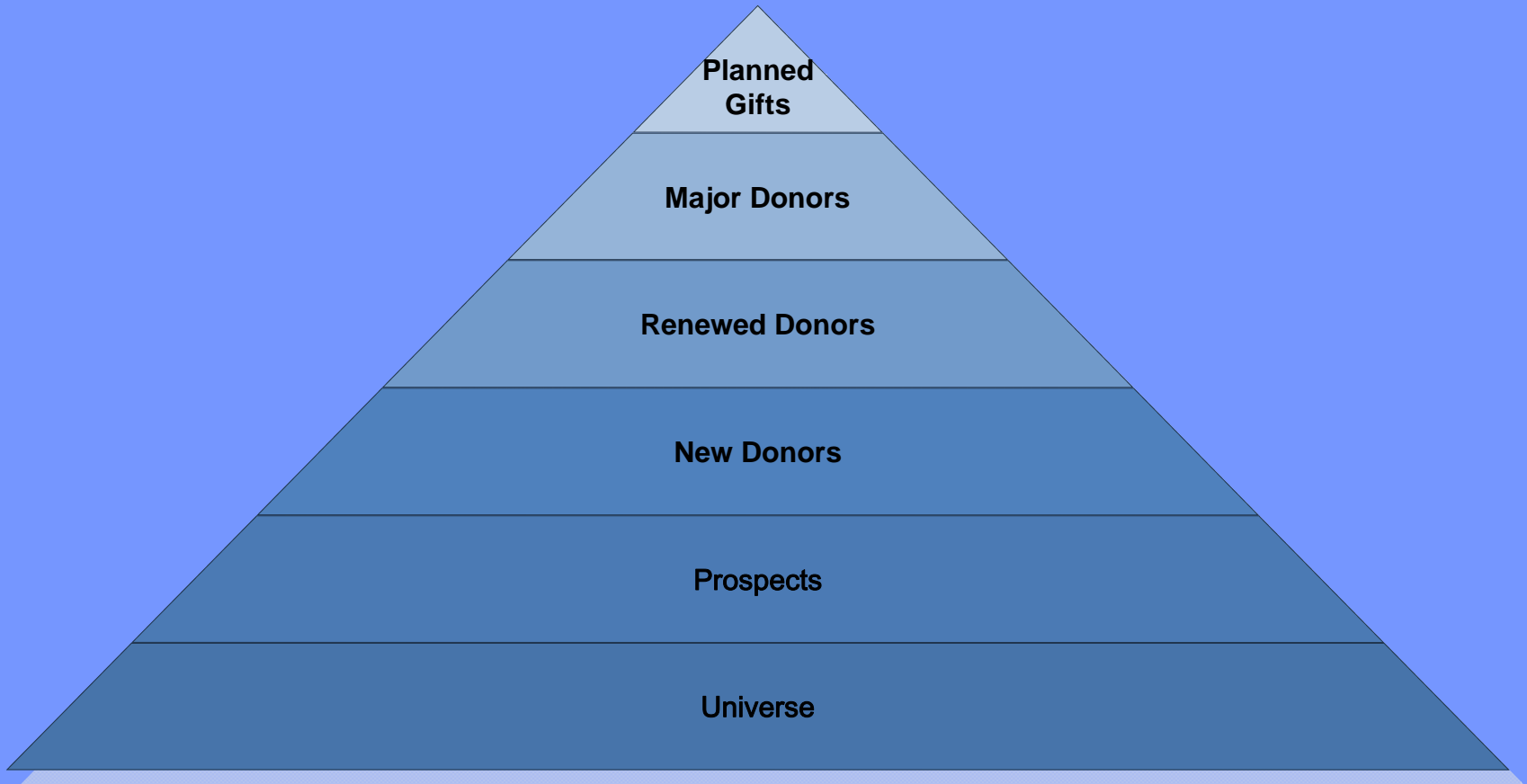
# Overview of Today

1. Proven Techniques to Upgrade Donors
2. Stewardship and Cultivation
3. Upgrades through Monthly Donor Programs
4. Marketing Planned Gifts
5. Questions and Answers

# Today's Themes

- Segmentation
- Proven Techniques
- Testing

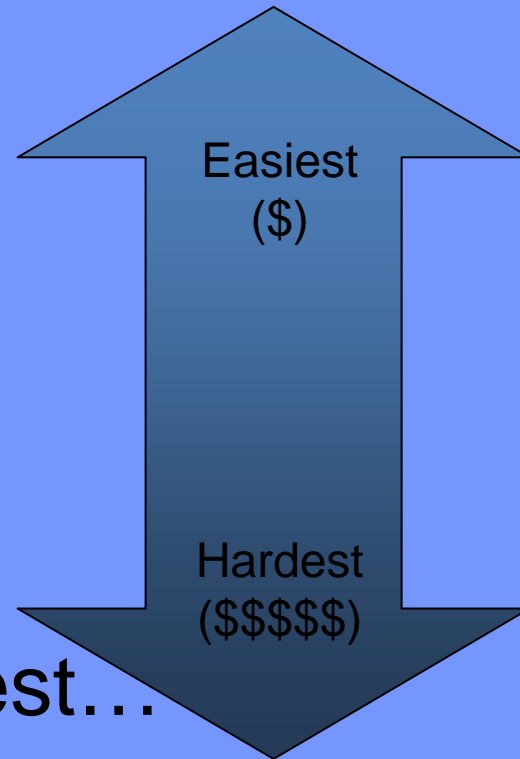
# Segmentation: The Donor Pyramid



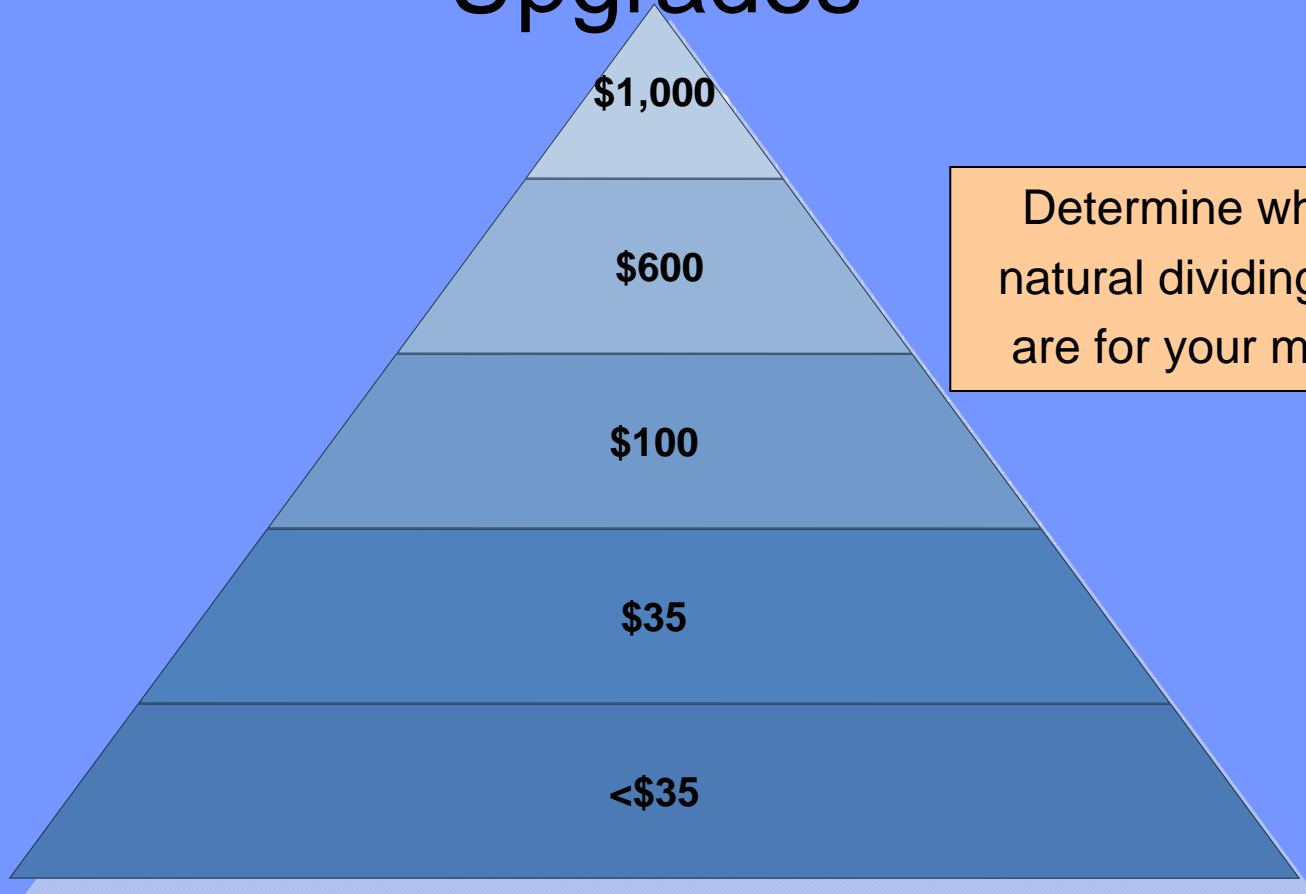
# Part 1: Proven Techniques to Upgrade Donors

# Three Approaches to Upgrades

- Segmentation and appropriate packages
- Special Offers
- Clubs and Societies
- In all things test, test, test...



# The Power of Segmentation for Upgrades



Determine what the natural dividing points are for your main file

# Slightly Different Versions of Packages for Upgrades

Closed Faced, First Class,  
 Personalized letter to \$250+,  
 same letter and reply

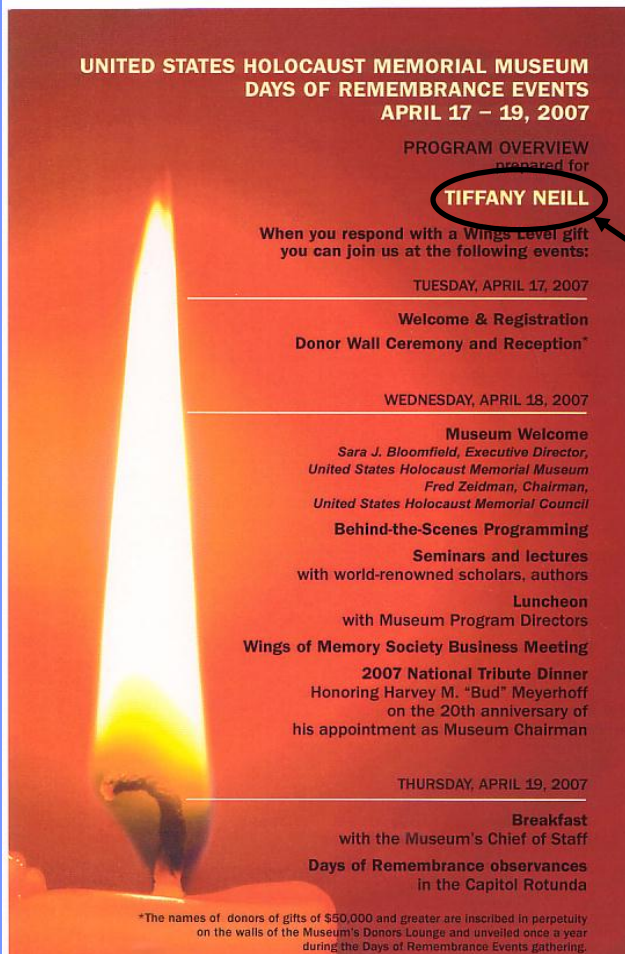


Renewal 1



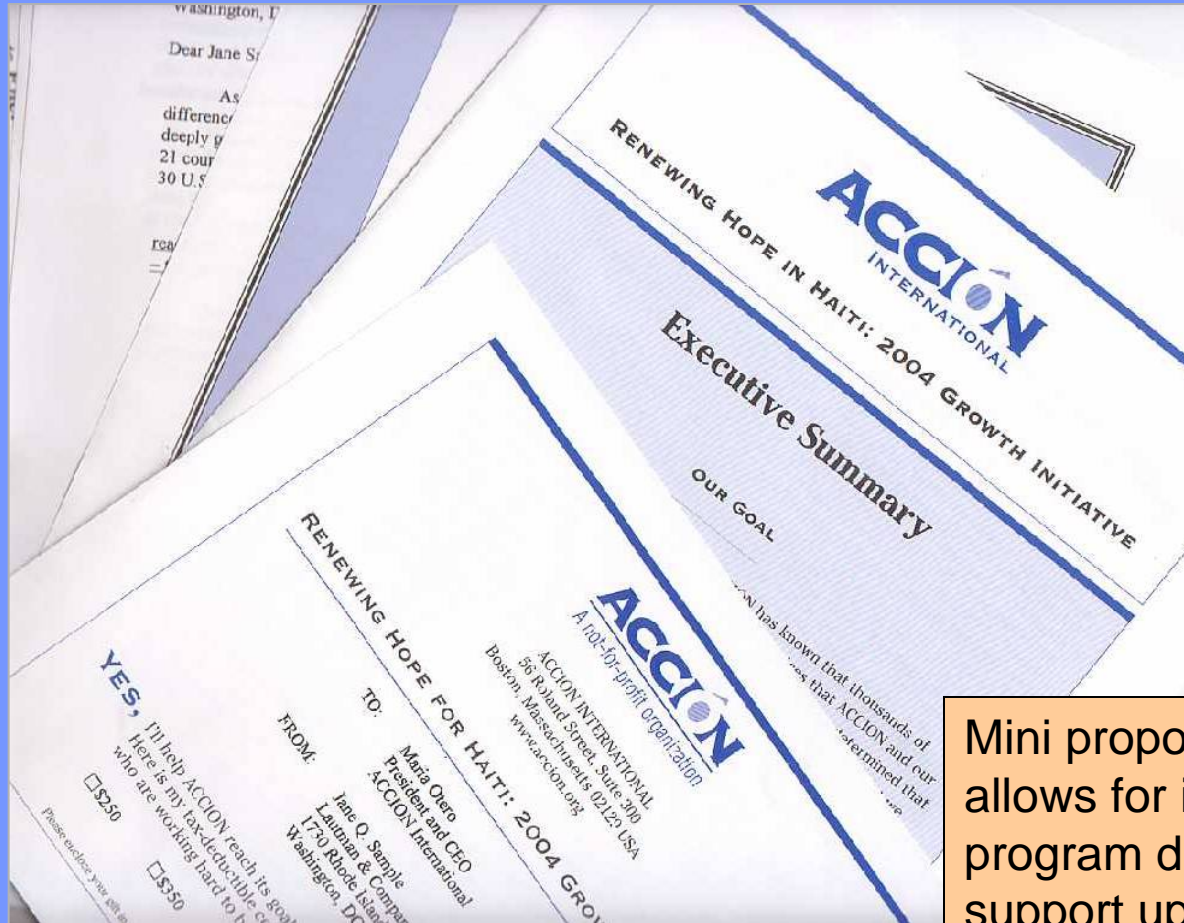


# Other Personalized Techniques



Full color insert  
"prepared for" the  
prospect. Cost  
effective in small  
quantities.

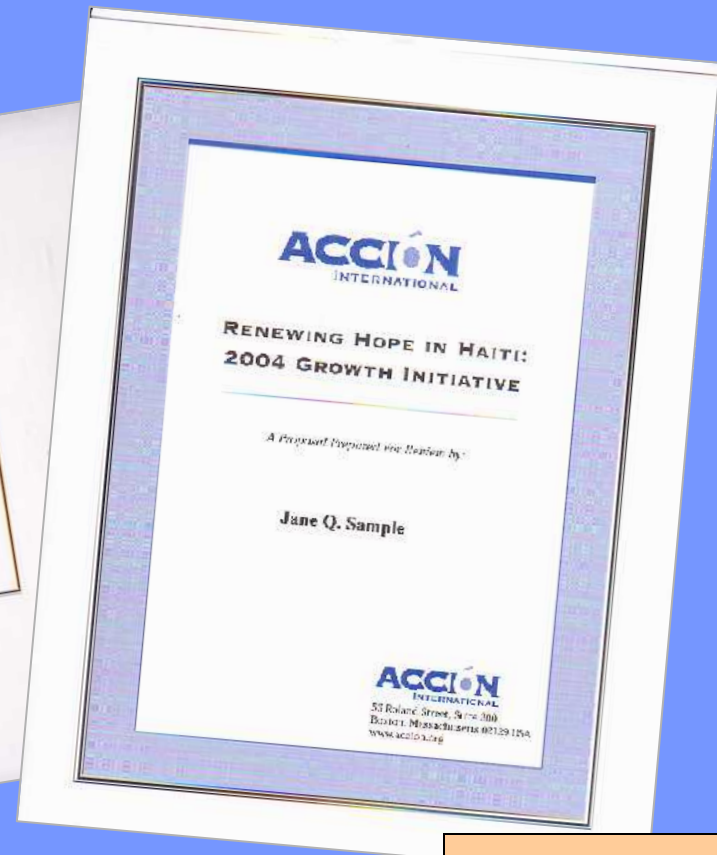
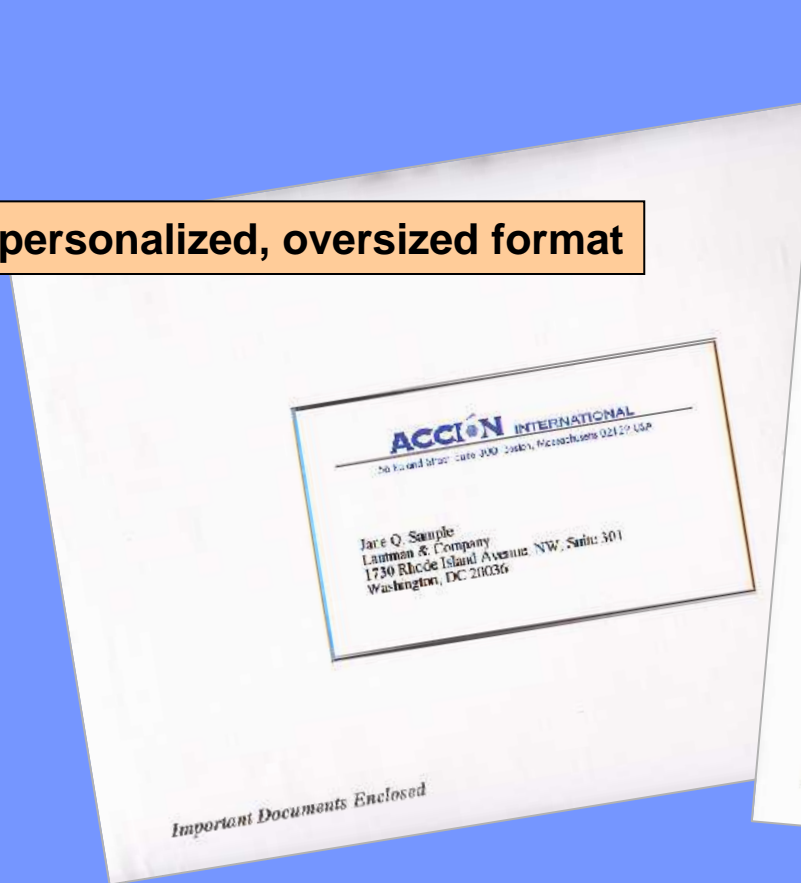
# Specific Asks: Mini-Proposal



Mini proposal format allows for in-depth program description to support upgraded ask

# Format for Higher Dollar Gifts

Highly personalized, oversized format

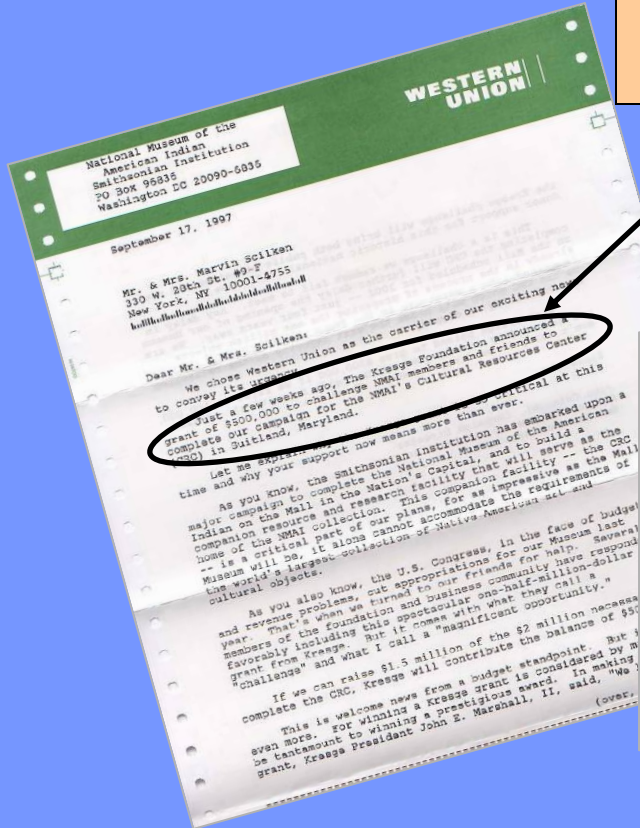


Personalized cover sheet

# Matching Gifts

Explains the Format

Tear-off reply focuses on match. Ask based on donor's highest previous gift



Please tear at perforation and return in the envelope provided.

YES! Here is my tax-deductible gift to the National Museum of the American Indian. Please include it in the total that will make the Kresge challenge grant a reality.

\$18     \$30     \$40     \$Other

Mr. & Mrs. Marvin Scilken  
330 W. 28th St. #9-F  
New York, NY 10001-4755

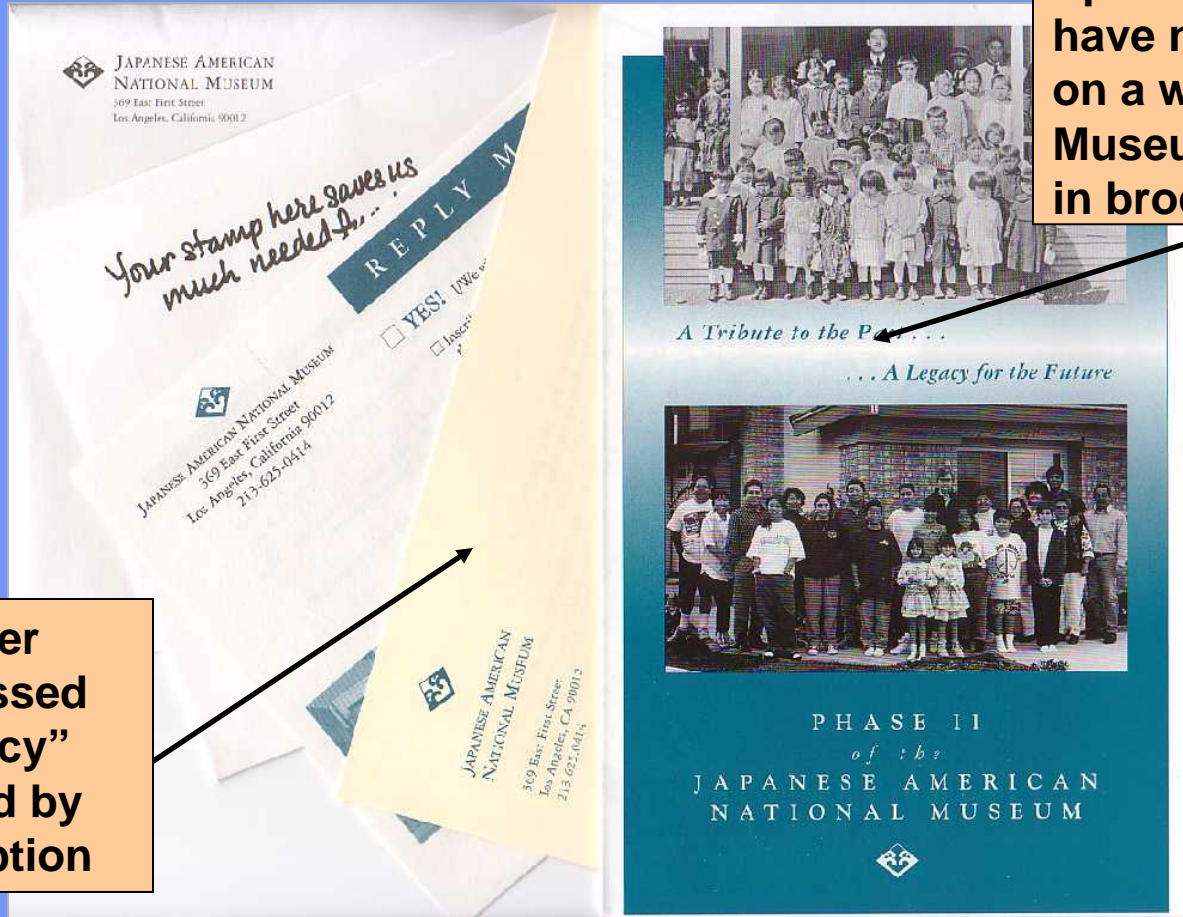
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Recycled paper    Recyclable

# Naming Opportunities

Special opportunity to have name inscribed on a window of the Museum highlighted in brochure

Letter discussed "legacy" served by inscription



# Defined Societies with Benefits

Central Park Conservancy  
Conservator's Program  
(\$1,000 giving threshold)

Invitation focused on  
the cache of CPC, and  
included a list of the high  
profile Trustees



**Special Cocktail Party  
to welcome New  
Members**

The Trustees of the Central Park Conservancy are honored to invite you to become a Conservator in our ongoing mission to restore, preserve, and maintain Central Park.

To celebrate your new leadership role, we invite you to attend our

**Windows on the Park  
Cocktail Party**

honoring new Conservators

Tuesday, June 13th, 2000  
6:00 - 8:00 p.m.

*R.S.V.P.*

# Central Park Conservancy

In appreciation of your generosity and commitment, the Board of Trustees of the Central Park Conservancy would like to offer you these special benefits:

## *B*elvedere Knight - \$1,000

- Listing in the Annual Report
- Invitations to Special Events such as: Halloween Gala, Family Ice Skating Party, Spring Celebration, and "Windows on the Park" Cocktail Party
- Invitation to a Central Park Tour (for two)
- Central Park Conservancy Tote Bag
- Central Park Map, Walking Tour Guide, and Newsletter

## *V*aux Visionary - \$5,000

- Bethesda Angel Benefits, plus:
- Private Mini-Van Tour of Central Park (for four)
- All Day Boat Rental (for two)

## *O*lusted Preservationist - \$7,500

- Vaux Visionary Benefits, plus:
- Gondola Ride on the Lake (for two)
- Private Mini-Van Tour of Central Park (for six)

## *G*reensward Guardian - \$10,000

- Olusted Preservationist Benefits, plus:
- Private Tour of Central Park with Central Park Historian (for six)
- Gondola Ride on the Lake followed by Coffee and Dessert at the Boathouse (for two)

## *B*ethesda Angel - \$2,500

- Belvedere Knight Benefits, plus:
- One Hour Boat or Bicycle Rental on the Lake (for two)
- Invitation to a Central Park Tour (for four)

**Benefits listed  
prominently in package**

# Part 2: Stewardship and Cultivation



# Special Packages to High Value Donors



These are a few of the nearly 1,800 vulnerable children who received essential clothing in one month - thanks to Corps' job creation program in Gaza.

from the desk of  
DAN O'NEILL

April 18, 2008

Dear Ms. Maska,

You have shown how very much you care about our world's most vulnerable people through your generosity and support of Mercy Corps. And I am sincerely grateful for your steadfast commitment to our work.

*In fact, today, since you are one of our closest friends, I am writing to you as a matter of utmost urgency.*

As you may know, turmoil in the Gaza Strip is extremely fluid and unpredictable, and the human toll on children and families, too — is truly being pushed to the limit.

These are the most severe days of isolation since the closure of the Gaza Strip in June 2007. That was when forces loyal to Hamas completely blocked all exports from Gaza — humanitarian supplies.

Because I am sure you are deeply concerned about this ongoing tragedy, I want to share with you a document I have just received.

It is an Internal Memorandum from the Director of Mercy Corps' program management. It fully updates me on the current humanitarian work there.

First, let me stress that Mercy Corps is calling for an end to violence in the Gaza Strip and in neighboring Israeli towns. We are not taking sides. We are a force for peace and we support the lifting of the blockade in Gaza.

Let me also stress that though Mercy Corps is committed to our efforts to ease the anguish of our people, we must also plan for the year and objectives we must attain.

We are now at serious risk of not reaching our goals. As a result, the suffering that afflicts vulnerable Gaza

PO Box 2669 • PORTLAND, OREGON

*Dan O'Neill*

MercyCorps

3015 SW First Avenue  
Portland, OR 97201

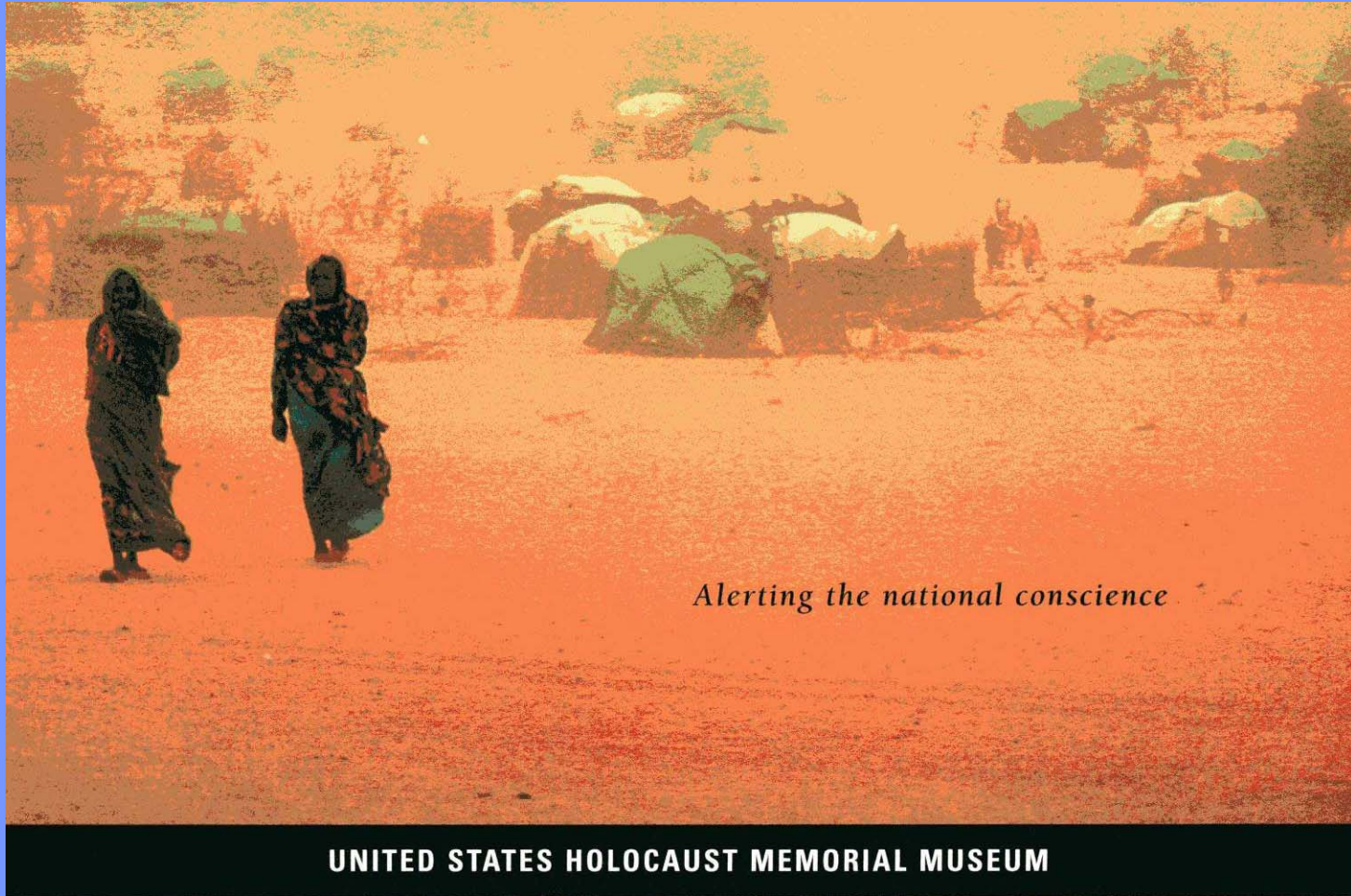


Lisa Maska  
12208 Hollow Tree Ln  
Fairfax, VA 22030-6246



FIRST CLASS MAIL


# Send Periodic Notes



*Alerting the national conscience*

**UNITED STATES HOLOCAUST MEMORIAL MUSEUM**

# Conference Calls Bond Donors



**PCRMEVENTS**  
Physicians Committee for Responsible Medicine

### Important Announcement for PCRME Stewards, President's Circle, and Lifetime Partner Members!

I just wanted to remind you about PCRME's second "Update from Dr. Barnard" conference call, exclusively for PCRME Stewards, President's Circle, and Lifetime Partner members. Here are the call details again:

<b>Date:</b>	Thursday, Aug. 23
<b>Time:</b>	2 p.m. EDT
<b>Conference Call Number:</b>	866-469-3239
<b>Conference Call Access Code:</b>	31829695

We invite you to join the call for an update from PCRME president Neal Barnard on PCRME's current and upcoming work. There will be a question and answer session.

The feedback from the previous update was enthusiastic. It is gratifying to have so many members engaged in our issues, pose great questions, and offer insightful comments.


#### SUPPORT PCRME

[Donate Now](#)

[Join PCRME or Renew Your Membership](#)

#### CONTACT

[Brian Halprin](#)  
PCRME Membership Coordinator



#### RELATED LINKS

[Subscribe to future PCRME e-mail communications](#)

# Differentiate Packages



3015 SW First Avenue  
Portland, OR 97201

*Welcome!*

3309 Wyndham Cir Apt 3173  
Alexandria, VA 22302-4313



3782  
0001

3015 SW First Avenue • Portland, OR 97201 • 800.292.3355



# Part 3: Monthly Donor Programs

# Mercy Corps “Partners In Mercy”

Carrier looks very personal and inviting.

Dan O’Neill  
3015 SW First Avenue  
Portland, OR 97201



Lisa Maska  
12208 Hollow Tree Ln  
Fairfax, VA 22030-6246



RSVP

Personal address label with letter signer’s name used.

# Reply Form Should Be Easy to Use



30274

## Partners in Mercy Acceptance and Enrollment Form

Lisa Maska  
12208 Hollow Tree Ln  
Fairfax, VA 22030-6246

193682  
0001/AP408B-SDSD

Yes, Dan, I want to help Mercy Corps reach out to families in need around the world. I'd like to make tax-deductible monthly gifts in the amount of:

\$20    \$22    \$25    \$30    Other \$ \_\_\_\_\_

- Please transfer the above amount from my bank account each month. I've enclosed a check for my first month's gift from the account I wish to use.
- Please charge the above amount to my credit card each month. My credit card information is filled out on the reverse
- I wish to mail in a check in the above amount each month. My first month's payment is enclosed.
- I cannot accept your invitation to become a Partner in Mercy right now, but I'm enclosing a one-time gift of \$\_\_\_\_\_.

I authorize Mercy Corps to receive the above amount from my credit card or bank account each month per the terms of agreement listed on the reverse.

Signature (required) \_\_\_\_\_ Date \_\_\_\_\_

Please make checks payable to:

**Mercy Corps**

3015 SW First Avenue • Portland, OR 97201 • 800.292.3355, ext. 250

Giving options are made simple.



# Photo Card Shows How Gifts Can Help

Shows heartwarming photo and tells what donor's gift will provide.





# Marine Corps Heritage Foundation's "Devil Dog Club"



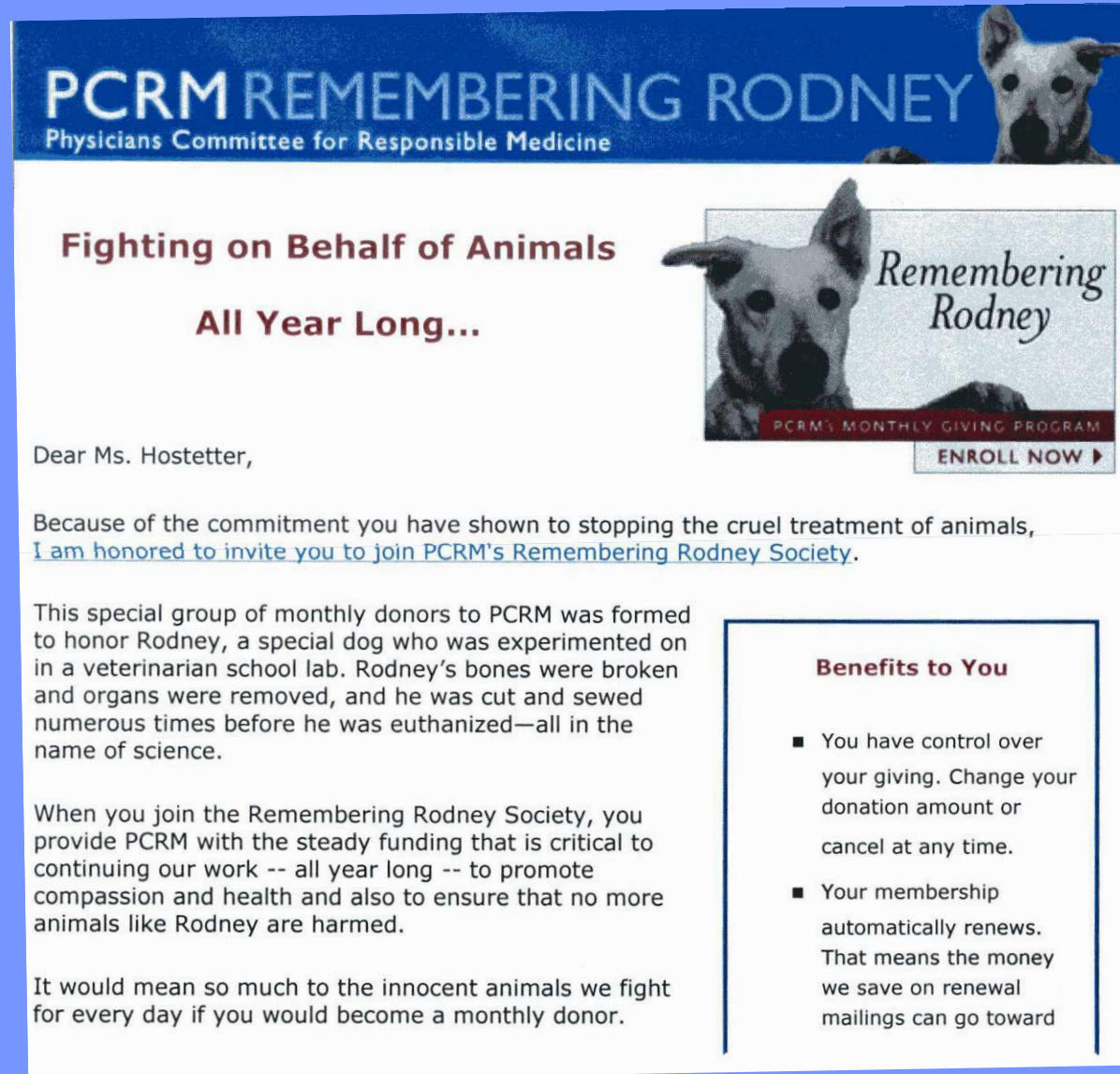
Only automated giving options are offered

# Certificate and Welcome Letter



Certificate bonds donor and creates excitement about program

# Email Invitation Proves Effective



**PCRM REMEMBERING RODNEY**  
Physicians Committee for Responsible Medicine

**Fighting on Behalf of Animals**  
**All Year Long...**

Dear Ms. Hostetter,

Because of the commitment you have shown to stopping the cruel treatment of animals, [I am honored to invite you to join PCRM's Remembering Rodney Society.](#)

This special group of monthly donors to PCRM was formed to honor Rodney, a special dog who was experimented on in a veterinarian school lab. Rodney's bones were broken and organs were removed, and he was cut and sewed numerous times before he was euthanized—all in the name of science.

When you join the Remembering Rodney Society, you provide PCRM with the steady funding that is critical to continuing our work -- all year long -- to promote compassion and health and also to ensure that no more animals like Rodney are harmed.

It would mean so much to the innocent animals we fight for every day if you would become a monthly donor.

**Remembering Rodney**  
PCRM'S MONTHLY GIVING PROGRAM  
**ENROLL NOW ▶**

**Benefits to You**

- You have control over your giving. Change your donation amount or cancel at any time.
- Your membership automatically renews. That means the money we save on renewal mailings can go toward

# Part 4: Planned Giving

# Planned Giving Prospects are Everywhere!



## Families in Gaza Struggle to Survive

*Al Mawassi, Gaza Strip*

Life has never been easy for the 8,000 people of Al Mawassi, an isolated strip of small farms, shanty houses and modest compounds near the Mediterranean Sea. According to the UN, since the 1970s, Israeli settlements and military checkpoints have restricted residents' access to the sea (and their ability to fish) to the west, and to schools and jobs in the east.

Today, despite the withdrawal of Israeli forces last summer, residents say things haven't improved. The Hamas government has not paid public workers in Gaza since February and Israeli border closures are blocking exports from Gaza's most fertile agricultural region. As a result, the economy is spiraling rapidly downward.

"Life is so difficult now," says Najwa, whose husband can only find sporadic part-time work picking potatoes in nearby fields for about \$1.40 an hour. "There are no jobs. There is nothing for us."

Mercy Corps is committed to helping Gazan families persevere through this latest crisis. We are providing staple food supplies — including sacks of flour and sugar and large bottles of vegetable oil — to 450 families in Al Mawassi, including Najwa's family. And a potential jobs program would provide



Photo: Thatcher Cook for Mercy Corps

*Mercy Corps is delivering food aid to Najwa Abu Eid's family and hundreds of other hungry families in Gaza.*

employment to members of the most vulnerable families.

Like other Gazans, Najwa remains remarkably hopeful. "God willing, the economic situation will get better, and my husband will find a job for the family."

## A Legacy of Compassion



Throughout her long life, Clara Wildenhof touched many hearts. Today, after her recent passing at age 94, she continues to touch lives — this time, thousands of families displaced by the terrible conflict in Sudan.

Deeply affected by the horrors she witnessed during World War II, Clara came to the United States as a widow in the 1940s. She settled in New York and went to work as a loving governess and caretaker for several families. Clara continued this work until she was in her 70s.

As her days drew to a close, Clara told a long-time friend that she wanted her life savings to go to help families displaced by the violence in Darfur. She decided to leave a large portion of her savings to Mercy Corps to help ease the suffering of men, women and children in this region.

After a life of caring service, Clara's compassion lives on in Darfur today. Her generosity is making a tangible difference in the lives of families who have lost so much ... their homes ... their livelihoods ... their loved ones.

Please consider including Mercy Corps in your estate plans. To receive personalized information about making a bequest or purchasing a charitable gift annuity, please contact Jennie Peabody at 1-800-292-3355, ext. 418, or at [jpeabody@mercycorps.org](mailto:jpeabody@mercycorps.org).

# Newsletter Articles

# Check-off on Reply Forms

## contribution reply form

### CREDIT CARD CHARGE FORM

Please charge my contribution to my:

VISA     MasterCard     AMEX

Amount: \$ \_\_\_\_\_

Account No.: \_\_\_\_\_

Signature: \_\_\_\_\_

Expiration Date: \_\_\_\_\_

Daytime phone number: (\_\_\_\_) \_\_\_\_\_

Yes, I would like to be an e-friend of the Museum and receive information about Museum programs electronically. My email address is: \_\_\_\_\_

Please send me/us information about how to include the Museum in my/our estate plans.

The most cost effective way to acquire new members is to occasionally exchange or rent our mailing list with other carefully selected organizations. If you prefer that we do not exchange your name, please check here.

In accordance with IRS regulations, your gift to the Museum is fully tax-deductible.

UNITED STATES  
HOLOCAUST MEMORIAL MUSEUM

MEMBERSHIP CORRESPONDENCE  
P.O. BOX 90988  
WASHINGTON, D.C. 20090-0988  
membership@ushmm.org



YES! I want to help the Museum rescue the evidence of the Holocaust and teach this and future generations the powerful lessons that evidence can teach. I have enclosed my special gift of:

\$36     \$55     \$75     Other \$ \_\_\_\_\_

My check payable to the United States Holocaust Memorial Museum is enclosed.


AMI0605CCNA2

999999905 1

Tiffany Neill  
Lautman & Co  
11514 Regnid Dr.  
Silver Spring, MD 20902-2448



# Planned Giving Newsletters that Work!



NATIONAL  
MUSEUM  
OF THE  
AMERICAN  
INDIAN

## LEGACY CIRCLE

### GIVING WHILE LIVING

**T**HE EXTRAORDINARY CONTRIBUTIONS of Bill and Melinda Gates and Warren Buffett provide a lesson in philanthropy. While few of us can make gifts on such a large scale as they have, there are good reasons to consider their model of giving while living.

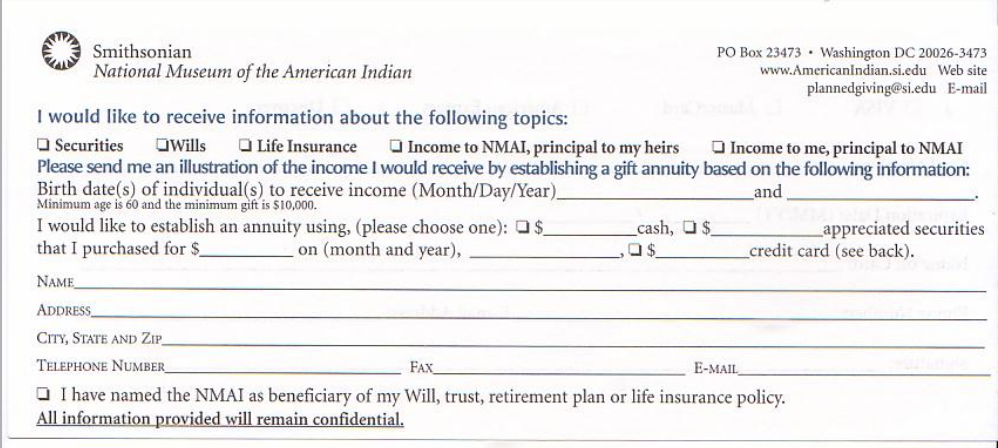
Making a charitable gift during your lifetime — rather than waiting to make a bequest through your Will — can yield immediate benefits for you:


- **First**, you can enjoy the satisfaction of supporting an organization in which you believe, like the Smithsonian National Museum of the American Indian (NMAI), and seeing the positive impact of your gift. You can witness the results of your generosity through the celebrations of Native cultures here at the Museum and through our innovative outreach programs.
- **Second**, you usually gain significant tax advantages from your gift. When you make a charitable gift, you receive an upfront income tax deduction, reducing your current tax bill. You also move money out of your estate, reducing future estate taxes. And if you use long-term appreciated securities such as stocks, bonds, or mutual fund shares to fund your gift, you may be able to



# Newsletter Mailings Generate Leads

- Packages should have a letter and reply form
- Donor stories help prospects “visualize” the gift
- Include specific program information



 Smithsonian  
National Museum of the American Indian

PO Box 23473 • Washington DC 20026-3473  
www.AmericanIndian.si.edu Web site  
plannedgiving@si.edu E-mail

I would like to receive information about the following topics:  
 Securities  Wills  Life Insurance  Income to NMAI, principal to my heirs  Income to me, principal to NMAI

Please send me an illustration of the income I would receive by establishing a gift annuity based on the following information:  
Birth date(s) of individual(s) to receive income (Month/Day/Year) \_\_\_\_\_ and \_\_\_\_\_.  
Minimum age is 60 and the minimum gift is \$10,000.

I would like to establish an annuity using, (please choose one):  \$ \_\_\_\_\_ cash,  \$ \_\_\_\_\_ appreciated securities  
that I purchased for \$ \_\_\_\_\_ on (month and year), \_\_\_\_\_,  \$ \_\_\_\_\_ credit card (see back).

NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY, STATE AND ZIP \_\_\_\_\_

TELEPHONE NUMBER \_\_\_\_\_ FAX \_\_\_\_\_ E-MAIL \_\_\_\_\_

I have named the NMAI as beneficiary of my Will, trust, retirement plan or life insurance policy.  
All information provided will remain confidential.

**Yes!** I want to find out how I can help the Hebrew Home of Greater Washington care for our Jewish elderly for many years to come by becoming a member of the *Builders of the Future*.

PG604B  
43680

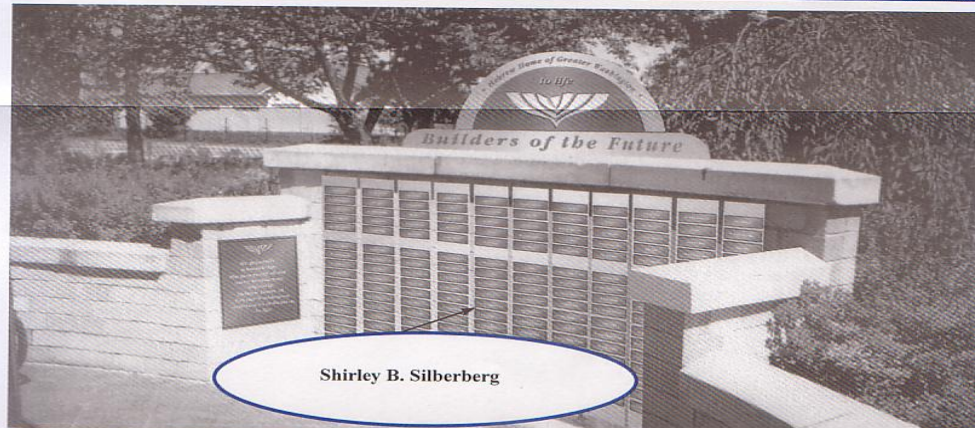
Please check all that apply and return the top portion of this form in the envelope provided.

Shirley B. Silberberg  
Apt 4-203  
9811 N Hollybrook Lake Dr  
Pembroke Pines, FL 33025-1588

- Please send me more information on how I can name the Hebrew Home in my will, trust, insurance policy or CD.
- Please send me information on how I can receive income for life.
- I have already named the Hebrew Home in my will, trust, insurance policy or CD. Please contact me about complimentary *Builders of the Future* membership.

#### BUILDERS OF THE FUTURE MEMBERSHIP BENEFITS

- ◆ Your name permanently engraved on a plaque at the prominent Builder's Pavilion at the entrance to the Wasserman Building (see photo below)
- ◆ Invitations to our elegant *Builders of the Future* annual brunch and other special events
- ◆ Quarterly issues of the informative four-color, *Builders of the Future* newsletter
- ◆ Your name listed in the Hebrew Home Annual Report and other publications



Shirley B. Silberberg

The Hebrew Home of Greater Washington is a registered charity in Maryland and we willingly comply with regulations governing charities in the State. In accordance with Maryland State regulations, we are pleased to inform you that a copy of the Home's financial statement is available upon request. For the cost of copies and postage, documents and information are also available from the Maryland Secretary of State.

# Offer Benefits and Recognition Societies

# Have Donors Tell Their Stories

*From the Desk of  
Jean Wentworth*

Dear Friend of GMHC,

Not a day goes by that our dear son Jonathan is not in my thoughts. He left us in 1994, a few years after his partner Gabe, who also died of AIDS.

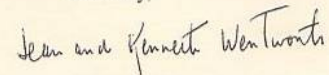
Kenneth and I wanted to do something to help others affected by this terrible disease, but because we are both musicians, and because Kenneth is retired, we are not rich people. We couldn't afford to make as large a gift as we would have liked.

However, we did have a will. So, we named GMHC as a beneficiary. It was easy to do, and we're proud to know that we can help make a lasting impact through our gift to GMHC.

Although we'll never stop missing Jonathan and Gabe, it helps knowing that our involvement with GMHC, and specifically our bequest, will make a difference to someone else's child.

Please consider joining us as a *Partner in Planning*.

Sincerely,



Jean (and Kenneth) Wentworth  
Members, *Partners in Planning*  
since 1995

# Make Sure Official Language Is Easy to Find

**Ensuring a Lasting Legacy**

SINCE SEPTEMBER 2004, more than 1 million visitors to the NMAI's new home on the National Mall have experienced a remarkable museum. Dramatically beautiful and symbolically rich, the building and exhibitions represent a unique collaboration between design architects, and Native American communities. Each object in our opening exhibitions was carefully selected by our curators in consultation with, and under the guidance of, twenty-four tribal communities from across the Western Hemisphere.

Yet the dialogue with Native communities that helped create the new museum did not end with the opening of its doors. In fact, it has just begun. The NMAI is reaching out to Native peoples where they live through workshops, internships, radio programs, visiting professional programs, traveling exhibitions, and Native artist programs. These outreach efforts constitute a "Museum without walls" – one unencumbered by distance or time and accessible around the world at any hour.

Support for these activities and for the educational programs at the three Museum facilities – the George Gustav Heye Center, the Cultural Resources Center, and the Mall Museum – comes in part from the NMAI endowment. Endowment funds are investment funds that preserve principal in perpetuity and produce annual interest earnings for program support.

Building the NMAI endowment, like constructing the new Museum on the Mall, depends on contributions. These can come from outright gifts of cash or gifts from a charitable trust, life insurance policy, or retirement benefit, as well as through an individual's Will or codicil.

Any of these gift opportunities can be designated and used for the endowment or left outright to be used for the NMAI's general support.

A contribution to the NMAI endowment will ensure a lasting legacy for generations to come by providing ongoing support for educational programs and outreach efforts that are integral to the mission of the NMAI – telling the stories of Native peoples from their point of view.

*Here is the language that we recommend you use to name the NMAI beneficiary of your Will or codicil:*


I hereby give and bequeath \_\_\_\_\_ (specific dollar amount, or a percent of the residue of the estate, or the proceeds from real estate that I own located at \_\_\_\_\_) to the Smithsonian's National Museum of the American Indian, located at 4th and Independence Avenue, SW, MRC 590, Washington, DC 20560-0590, whose federal tax identification number is 53-0206027, for \_\_\_\_\_ (an NMAI endowment for support of Museum activities, or for its general purposes).

If you have named the NMAI beneficiary of your estate, charitable trust, life insurance policy, or retirement benefit, we would appreciate your sharing this information with us so that we can thank you now for your future support and welcome you as a new member of our *Legacy Circle*.

**Education & Outreach**

To learn more about the NMAI's ongoing educational programs and outreach efforts, please visit our Web site at [www.AmericanIndian.si.edu](http://www.AmericanIndian.si.edu) and click on "Outreach."

For additional information about naming the NMAI as beneficiary of your Will, trust, life insurance policy, or retirement plan, please contact Todd Cain, development officer, in the Office of External Affairs, Smithsonian National Museum of the American Indian, at PO Box 23473, Washington, DC 20026-3473; by telephone at (202) 633-6936; or by e-mail at [plannedgiving@si.edu](mailto:plannedgiving@si.edu).

 **Smithsonian**  
*National Museum of the American Indian*  
PO Box 23473 Washington DC 20026-3473  
Website: [www.AmericanIndian.si.edu](http://www.AmericanIndian.si.edu) Email: [plannedgiving@si.edu](mailto:plannedgiving@si.edu)

You want to make sure  
that bequests actually  
reach you!

# Reply Form Needs to Collect Information



3015 SW First Avenue  
Portland OR 97201  
800.292.3355, ext. 250  
www.mercycorps.org

## GIFT ANNUITY INFORMATION FORM

Please send me information on how I can establish a gift with Mercy Corps that will provide me with income. I have completed the information below.

Ms. Jane Q. Sample  
Lautman & Company  
Suite 301  
1730 Rhode Island Avenue, NW  
Washington, DC 20036

999999

I'm interested in learning more about the financial and charitable benefits of a gift annuity with Mercy Corps.

Birth date(s) of individual(s) to receive income: MM / DD / YYYY and MM / DD / YYYY.

Amount of annuity:  \$ \_\_\_\_\_ (if left blank, \$10,000 will be used for the calculation).

### Other Ways to Support Mercy Corps


- Please send me more information on how I can name Mercy Corps in my Will, trust, insurance policy, or retirement plan.
- Please send me instructions for making a gift of appreciated securities.
- I have already named Mercy Corps as beneficiary of my Will, trust, insurance policy, or retirement plan. Please send me information about activating my membership in the Giron Legacy Society.

Kindly provide the following information so we can contact you (all information will remain confidential):

Telephone Number: \_\_\_\_\_ Fax Number: \_\_\_\_\_

Email Address: \_\_\_\_\_

# Include “Personalized Case”

 Smithsonian  
National Museum of the American Indian

**Summary of Benefits**

5.7% Charitable Gift Annuity

ASSUMPTIONS:

Annuitant	60
Principal Donated	\$10,000.00
Cost Basis	\$10,000.00
Annuity Rate	5.7%
Payment Schedule	quarterly at end

**BENEFITS:**

Charitable Deduction	\$3,691.10
Annuity	\$570.00
Tax-free Portion	\$261.63
Ordinary Income	\$308.37

After 24.1 years, the entire annuity becomes ordinary income.

IRS Discount Rate is 6%

These calculations are for illustration purposes only and should not be considered legal, accounting, or other professional advice. Your actual benefits may vary depending on the timing of the gift and your age. For a free illustration of the benefits you would receive by establishing this gift with the NMAI, contact Virginia Elwell, director of development, Office of External Affairs, Smithsonian National Museum of the American Indian, at P.O. Box 23474, Washington, D.C. 20026-3473; by telephone at (202) 633-6934, or send her an e-mail message at [plannedgiving@si.edu](mailto:plannedgiving@si.edu). All inquiries are confidential and at no obligation.

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