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Do you wonder how some people
always come out ahead?

Look inside for answers...

DEVELOP

A Successful Program With Leading Experts in the Gift Planning Field



Johni Hays, J.D.
Senior Planned Giving Consultant

With more than 15 years of experience as a practicing attorney specializing in charitable and estate planning, Johni Hays is a recognized expert on the subject of planned giving.

Johni is the author of *Essentials of Annuities* and co-author of *The Tools and Techniques of Charitable Planning*. She has been quoted in *The Wall Street Journal* and has written articles for *Estate Planning*, *Fundraising Success*, *Life Insurance Selling*, and *National Underwriter* magazines.

Johni has been a senior planned giving consultant with The Stelter Company for the past four years and is in demand as a lecturer on estate and charitable planning, annuities, life insurance, retirement planning, and IRAs. She holds a Juris Doctor and a Bachelor of Science degree from Drake University in Des Moines, Iowa.



Suzanne Mineck
Planned Giving Consultant

Suzanne Mineck is a planned giving consultant for The Stelter Company. She brings a wide range of experience in gift planning, major gifts and marketing to the seminar from organizations of all missions and sizes.

Prior to joining Stelter, Suzanne was the senior director of gift planning for St. Jude Children's Research Hospital in Memphis, Tenn. At St. Jude, Suzanne managed the Major Gifts and Foundation departments determining strategic direction and overseeing major prospect research, development and marketing. She has also worked with the American Cancer Society, The University of Iowa, the University of Memphis and Hutchison School. Suzanne holds a Bachelor of Arts degree in English and communication from Luther College in Decorah, Iowa.

"Thanks for the great course! The material was well organized and helpful. You are terrific facilitators... you kept it light and kept it moving. Thanks for making the experience very worthwhile."

Chuck Loring, Senior Partner,
Loring, Stenberg & Associates

Recent studies forecast a **\$6 trillion charitable donation boom** over the next 50 years.
Are your members prepared to cash in?

Do your members know the difference between a CRUT, a CRAT, a NIMCRUT, a FLIPCRUT, a CLUT and a CLAT?

For practical, real-world answers to these questions and on-site training details, see inside!

About The Stelter Company

The Stelter Company is the leading source for gift planning marketing for the nonprofit community, serving more than 2,650 clients nationally with a staff of 80 individuals, and has been exceeding customer expectations for 46 years. Our tagline, "Getting to the Heart of the Matter," speaks of our fervent belief that effective philanthropy must begin with understanding and touching the donor's strongest emotions and passions. We know that commitment to your organization and belief in your mission are what motivate donors to give, and our communications are designed to foster that commitment and belief while educating donors about the benefits of various gift vehicles.

Stelter offers a complete line of custom-designed, direct mail gift planning programs and the most complete interactive gift planning Web product in the country. Our services include the only nationwide field staff that conduct face-to-face, on-site marketing consultations. Learn more about how we can assist your organization in "Getting to the Heart of the Matter." Visit us at www.stelter.com or call 800-331-6881.



On-Site Essentials For Gift Planning Success™

"This is the best seminar I have attended. It was practical, informative, user-friendly... I appreciated the personal examples...I would highly recommend this to anyone responsible for a planned giving program."

—Sister Mary Theresa Sherland,
Director of Planned Giving, Chestnut Hill College

CHAPTER PRESIDENTS:
Our on-site training saves you time and money!

Here's an opportunity for your AFP members to learn the essential skills needed to build, run and grow a successful gift planning program from your location...

- » **Nuts and bolts**—learn the newest trends, discover innovative fundraising strategies, master the secrets of effective major gift solicitations, get online fundraising tips you can use immediately, and much more
- » **Effective marketing techniques**—expand your thinking, explore different marketing tracks, and get new insights on how to market your program and your cause
- » **Planned gift vehicles**—what to aim for, what to avoid and how to maximize gift impact for your organization and your donors

WE'LL BRING IT TO YOU!

The Stelter Company's On-Site Essentials for Gift Planning Success™ Seminar!

»» Secure Your and Your Members' Working Future

With The Stelter Company's On-Site Essentials for Gift Planning Success™ Seminar

Why should members of your chapter attend this seminar?

1. Because this seminar will help them develop a consistent plan to ensure that their organization receives the donor support it needs to succeed and thrive for years to come.
2. Because gift planning isn't just about wills—it's about matching the right donor to the right gift vehicle at the right time.
3. Because organizations with effective gift planning programs significantly increase revenue—some by 65 percent over the past five years!
4. Because they'll close more gifts if they know how to explain the various ways donors can fulfill their personal needs and support the organization's mission at the same time.

PLUS...

Whether your members are beginning their careers or have recently assumed responsibility for a gift planning program, this seminar provides all the tools they need to start, run and grow a successful gift planning program.

- » Discover the essential elements of a **winning sales approach**.
- » Learn how to **adapt to prospects' behavioral styles**.
- » Know the **six best assets for giving**.

»» And that's just for starters!

This seminar is loaded with specific, **actionable information your members can use right away** to successfully close more gifts year after year...

- » Setting the ground **rules for giving**
- » Tips for **effective Internet marketing**
- » **How to anticipate donor needs**
- » **Nine factors that trigger will-making** (and the six barriers your members need to overcome for success)
- » **"Secret Givers"**—are your members leaving money on the table?
- » **Handle with care**—six assets that require very special handling
- » **Income tax do's and don'ts**
- » Eight types of **bequests**
- » The ins and outs of **charitable gift annuities**
- » The **right way** and the **wrong way** to structure a **life insurance gift**
- » The how-to of **real estate gifts**
- » **Wealth replacement** strategies
- » **Savings bonds, annuities, CRTs, CLTs**
- » **Funding charitable bequests** with IRAs and qualified plans
- » **Customizable forms** to share with anyone, anywhere
- » **Network** with peers, trade ideas

»»EXTRA-SPECIAL BONUS!

Seminar manual is for your members to keep! (a \$299 value)

And it's jam-packed with all the information your members need to run a successful planned giving program! A great reference when answers are needed fast!

»» Seminar Program

»» Day 1 | 9 a.m. to 4:30 p.m.

- » **Building Your Program**
Assess your staffing, budget, technology, gift acceptance policies and recognition procedures
- » **Sharing Your Message**
Best practices for marketing your program
- » **Supporting Your Mission**
Essentials of donor prospecting, cultivation and stewardship
- » **Assessing Your Program**
Set realistic goals and manage expectations

»» Day 2 | 9 a.m. to 4:30 p.m.

- » **Introduction to Planned Gift Vehicles**
Revocable and irrevocable gifts, avoiding troublesome gifts, and donor tax consequences
- » **Beyond the Basics**
Gift annuities, retained life estates and bargain sales
- » **Tax-Heavy Gifts**
IRAs, retirement plans, commercial annuities and savings bonds
- » **Sophisticated Gift Vehicles**
Charitable remainder trusts and charitable lead trusts

»» Who should participate?

- » Gift planning and major gifts staffs that are starting gift planning programs
- » Development officers who are assuming gift planning responsibilities
- » Executive directors who are responsible for gift planning programs

»» Need CFRE credits?

Your members can earn 11 credits toward their **CFRE** when they attend Stelter's On-Site Essentials for Gift Planning Success™ seminar.



»» We'll also create an e-mail blast to help you promote your on-site seminar

A \$499 value! All you have to do is send us the date and location of your seminar, and we'll write, design, and code your own customized e-mail message to send to your members!

"This seminar was great! I thoroughly enjoyed it... it's one of the most helpful seminars I've attended since getting into this field."
Heather Spurrier,
Associate Director of Development,
Washington College

»» On-site training is the way to go!

Call today to reserve your on-site seminar. All you need to provide is the meeting room for two days along with snacks and lunch for all participants, plus our facilitators' travel and lodging expenses...and we'll do all the rest!



Please call an account manager at 800-331-6881 for details and a quote. Minimum of 20 participants required.

»» 100 PERCENT SATISFACTION GUARANTEED OR YOUR MONEY BACK

"I am committed to providing you with the best, most effective education and training in the professional fundraising field. If for any reason you are not 100 percent satisfied with your Essentials for Gift Planning Success™ seminar, I will refund your registration fee in full."†

—Larry Stelter, President and CEO, The Stelter Company
†Requires a written request within 30 days of the workshop



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From the desk of Larry Stelter...

[Prospect]
[Position]
[AFP Chapter Name]
[Street]
[City, State, ZIP]

Dear fName,

You've read about it 'til you're bleary-eyed. You've been hearing about it ad nauseam. There's just no escaping bad news on the economy...or the impact bad economic news has on your members' fundraising efforts.

And with 24-hour news cycle hysterics and conflicting economic reports pushing donor anxiety through the roof, your members—now more than ever—need to make sound strategic and tactical fundraising decisions. And they'll have to make every hard-earned marketing dollar they have work even harder. Because the right choices now could mean the difference between future success and imminent failure for their organizations, not to mention the causes and people that so dearly need their support.

As a nonprofit advocate, I understand you want to **help your members make the right choices**. And with belts tightening and training dollars dwindling, I know you want to *give your members timely, effective, actionable information—as quickly and affordably as possible*.

So I've come up with a fast, easy, cost-effective way for your members to get the information they need to survive the tough times today...and position themselves for even greater success in the future.

It's called The Stelter Company's ***On-Site Essentials for Gift Planning Success Seminar***.

That's right! We'll bring our highly acclaimed gift planning seminar to you. To *save your members time and money*, and provide valuable, up-to-date information, tactics and strategies they can use right away to help the organizations, people and causes they care about most.

And don't worry! Our ***On-Site Essentials for Gift Planning Success Seminar*** covers the same crucial topics with the same in-depth training and attention to detail as our regular Essentials for Gift Planning Seminar. But your members won't have the budget-busting expense, hassles and headaches they'd have if they had to travel to an out-of-town seminar. And they'll be able to turn those wasted travel hours into productive time they can use to implement the strategies and tactics we teach right away.

“This is, by far, the most valuable seminar I have ever attended! From the knowledgeable and engaging presenters to the excellent printed materials and resources... This has given me the support I need to deal with challenges and relate more personally and confidently to our donors. Thank you so much!”

—Catherine Quinn
Director of Development,
Chestnut Hill College

For instance, in just two days of **on-site instruction**, your members will quickly learn the seven essential gift planning skills used by the most successful fundraisers today:

- **Building Your Program**—assess staffing, budget, technology, gift acceptance policies and recognition procedures
- **Supporting Your Mission**—essentials of donor prospecting, cultivation and stewardship
- **Assessing Your Program**—determine how best to set goals and manage expectations
- **Introduction to Gift Planning Vehicles**—revocable and irrevocable gifts, avoiding troublesome gifts, and donor tax consequences
- **Beyond the Basics**—gift annuities, retained life estates and bargain sales
- **Tax-Heavy Gifts**—IRAs, retirement plan assets, commercial annuities and savings bonds
- **Sophisticated Gift Vehicles**—charitable remainder trusts and charitable lead trusts

...and much more!

We'll tailor the seminar to address your members' unique circumstances. Our professional facilitators will help them build a program that specifically addresses their problems and maximizes their strengths. We will help any organization of any size design and implement a planned giving program, regardless of the demographics of their donor base or the size of their marketing budget.

Each of your members could spend thousands of dollars on tuition, fees, travel expenses, à la carte webinars, books and minicourses—not to mention the hundreds of hours in lost productivity and travel time to get this vital information.

But 20 (or more) of your members will get two days of intense training, personalized instruction, strategies that work and proven tactics they can use right away from top professional experts in the fundraising industry— for just \$535 per person. Similar industry seminars start at \$1,199!

And that's just for starters...

When you host your Stelter *On-Site Essentials for Gift Planning Success Seminar*, you and your members will receive **two additional bonuses absolutely free of charge**:

- » Seminar workbooks (for your members to keep!—a \$299 value), and an extra-special bonus...
- » One free customized e-mail blast to promote your seminar—a \$499 value! All you have to do is schedule your seminar, and we'll write, design and create a customized e-mail message for you to send to your members!

That's \$1,462 worth in valuable bonuses, for you and your members just for hosting a Stelter Company On-Site Essentials for Gift Planning Success Seminar!

The only things you have to provide, with the exception of a minimum of 20 eager members ready to learn, is a meeting room for two days, snacks and lunch for your participants, and our facilitators' travel and lodging expenses.

And I give you my personal guarantee... If any participant is not 100% satisfied with the training received at the *On-Site Essentials for Gift Planning Success Seminar*, I will refund his or her registration fee in full. Simply send a written request from the participant within 30 days of the workshop and I will cheerfully send them a refund.

So your members have nothing to lose and everything to gain! Because they will receive...

- » The best, most complete and comprehensive training available at a time and place that's convenient for them
- » All the vital tools they need to ensure long-term security for their organizations, their causes and the people that need their help the most
- » Hundreds of dollars worth in free bonuses—theirs to keep as participants in our ***On-Site Essentials for Gift Planning Success Seminar***

Plus...

No travel headaches, money savings, time savings and your own customized **On-Site Essentials for Gift Planning promotional e-mail blast**, absolutely free of charge.

It's easy to get started. Call an account manager at 800-331-6881 to receive a quote.

Your members trust you to provide the most up-to-date, effective fundraising information available. So please don't delay! Take a moment to review the enclosed brochure or call an account manager at 800-331-6881 today!

Sincerely,



Larry Stelter
President and CEO
The Stelter Company

P.S. Don't forget! When everyone else is cutting back in a down economy, your members can make significant gains by kicking their marketing efforts into overdrive! And the techniques they'll learn at our ***On-Site Essentials for Gift Planning Success Seminar*** will help put their organizations in even stronger positions when the economy turns back around (as it always does).

Don't miss out on this opportunity to help your members be more successful...please call today!