



Case Statement

LEAVE A LEGACY is an award-winning public awareness campaign that encourages people from all walks of life to include a charitable bequest in their will or estate plan. The campaign's core message is that each of us has the potential to make a difference in the lives that follow by leaving a charitable bequest.

Inspiring People to Give

Jack Eggers was a janitor at a rural Indiana elementary school. He lived a bare-bones existence; he grew his own vegetables and lived alone in a tiny ramshackle home. In the course of his humble life, he banked more than \$200,000. When Jack died of brain cancer, he donated it all to his school, his church, and the local community foundation.

Jack is just one example of how every person has the power to impact the future by leaving a bequest to charity. Not everyone will save the way Jack did, but just imagine the impact on our society if each American set just a little something aside for a favorite charity or cause in his or her will. The collective impact would be phenomenal.

Research conducted by the National Committee on Planned Giving (NCPG) indicates that a primary reason Americans donate to charity is the desire to help organizations that have somehow touched or inspired them. However, NCPG's *Planned Giving in the United States 2000: A Survey of Donors* noted that many people believe that leaving a gift to charity in their will is only for the wealthy. LEAVE A LEGACY was established in 1996 to help change that perception.

While Jack had a long-time relationship with his school, most donors who leave a bequest are unknown to the recipient organization during their lifetime. According to NCPG's Donor Survey 2000, one in five people who has left a bequest to charity has no known relationship with that charity. With concerted bequest awareness activities, that number will rise.

The need for increased awareness of bequest giving is critical. According to a frequently cited Boston College report, \$41 trillion will transfer from one generation to the next between the years 1998 and 2052. Of that, at least \$6 trillion is expected to go to charitable causes. Before the wealth transfer effect can be felt within the nonprofit community, the public first must be made aware of the possibility to have a positive impact through a bequest.

The Need is Great

The need for sharing the message of the LEAVE A LEGACY campaign is clear. As a 2004 Associated Press report indicated, writing wills is not a priority in the lives of Americans. In fact, 42% of Americans don't have a will prepared. More than 80 percent of Americans contribute to the nonprofit groups of their choice throughout their lifetimes—but according to research conducted in 2000, only around eight percent of people chose to continue this support through a charitable bequest. Additionally, the IRS reports that 82% of the nation's wealthiest individuals leave nothing to charity in their estate plans.

According to NCPG's Donor Survey 2000, 34% of donors have learned about charitable bequests from a charity, and 21% through a legal or financial advisor. It is clear from these statistics that additional means of educating the public about charitable bequests are needed. LEAVE A LEGACY addresses that need.

“The Rising Tide Lifts all Boats”

LEAVE A LEGACY volunteers enable community partners from nonprofit and corporate sectors to spread the campaign's message through use of the LEAVE A LEGACY logo and campaign materials. Community partners include charitable organizations, donor advisors and corporations. These partners strengthen the movement by using campaign materials wherever they can, by donating in-kind services and direct financial support for local efforts, or by helping to conduct awareness activities at the local level.

The campaign includes a full-color series of ads with a strong emotional appeal. The campaign concept was developed in response to national market testing that involved feedback from focus groups across the country comprised of individuals from both general and affluent populations. The campaign also includes posters, billboards, bus advertisements and public service announcements for radio and television.

The success of LEAVE A LEGACY is based on a strong history of collaboration and partnership. Because LEAVE A LEGACY promotes giving to the charity of one's choice, partner charities—and the charitable community as a whole—benefit from the message. For corporate partners, the campaign's broad appeal provides an attractive option for giving back to the community without the risks inherent in endorsing a particular charity or cause.

Your help is needed to ensure that the LEAVE A LEGACY message continues to inspire citizens to make a difference in the lives that follow!