

We are always searching for words which will stimulate prospects to explore charitable estate and gift planning. A review of several past articles and material created by others led me to develop the following listing. When available the purpose is also listed. You are receiving this in advance before wider distribution.

Taking the mystery out of charitable estate and gift planning (Seminar)

- You are invited to influence the future (Brochure)
- Estate planning can cost less than you think (Ad)
- Does your estate plan need a makeover? (Ad)
- A gift that offers more than I ever imagined (Gift annuity ad)
- The gift that gives back (Gift annuity flyer)
- Finishing Well Harvesting the “Nuggets of Aging” (Seminar)
- Will your children create a legacy with your assets? Or will you? (Seminar)
- IRA conversion strategies and charitable gift options (Seminar)
- Are you planning for tomorrow? (Lunch and learn estate planning series)
- Giving Back (Donor profiles)
- Leverage the fruits of your labor (Ad for life income gifts)
- Giving is the secret to living fully while you are still alive (Donor profile)
- Legacy...A mark that cannot be erased (PG gift brochure)
- Plan for future of your estate (Life insurance explained)
- Plan your road trip to year-end tax savings (End of year flyer)
- Leave a legacy of the next-generation medicine (Postcard)
- Some of the best investments are made in stocks, bonds and people (CGA ad)
- Secure your retirement income in today uncertain world (Seminar)
- Sometimes the best way to manage your money is to do the unthinkable. Give it. (Ad)
- Dust off the cobwebs and bring new life to an old life insurance policy. Gift it! (Postcard)
- A great gift opportunity at the right time (Postcard)
- A Charitable Gift Annuity is an excellent way to support the great people of ABC (Postcard)
- Fixed income you can count on. An organization your can trust. (Ad for CGA)
- Start changing lives, beginning with your own (PG brochure)

- Let your passion for (Charity) live on (Ad for PG options)
- Do more than you thought possible with a charitable gift annuity (Ad)
- You can benefit from an IRA Rollover gift this year and in the future years if.. (Postcard)
- Three stages of will planning (PG newsletter)
- Gift of hope (PG newsletter)
- Take smart step toward more secure future (AD for CGA)
- The prescription for even greater excellence is in your hands. (Legacy society brochure)
- Honoring donors who have remembered (Charity) through estate planning (Legacy brochure)
- Make a gift of capital assets to help end cancer (Postcard)
- Make an impact with a gift to (charity) that pays your back – now or later (Postcard)
- Give and receive this holiday season with a gift to (charity) (CGA postcard)
- Choose how you make a difference -meet your goals with a year-end gift (postcard)
- What do you mean I could lose up to 70% of my hard-earned IRA? (Postcard)
- 8 planning mistakes that ca cost your family (Postcard for seminar)
- Act now: use your IRA RMD to make a tax-free gift to (Charity). (Postcard)
- When Life Changes, Adjust Your Plan (Newsletter)

This information is a service of Connell & Associates. For a confidential proposal for any charitable estate or life income gift send details to the email address below.



ABOUT JAMES E. CONNELL

James E. Connell FAHP, CSA of Connell & Associates, Pinehurst, North Carolina, is a respected gift planning consultation firm with over four decades of experience offering a broad range of charitable estate and gift planning services to non-profits throughout the country. He heads CONNELL & ASSOCIATES, Charitable Estate & Gift Planning Specialists in Pinehurst, North Carolina. Contact him to help your organization analyze the value CGAs may provide.

Contact James at 910-295-6800 or james@connellandassoc.com or fax him at 910-295-6866