



Imagine the impact
if we all left 10% of our assets to our community.

LEARN MORE!
southsound.leave10.org



Individuals



Advisors



Nonprofits

Rick – Opening Statement:

Hello, I'm Rick Oldenburg, Executive Director of South Sound Planned Giving Council, Principal of Oldenburg and Associates, and Co-chair of Leave 10 South Sound.

We've just heard compelling information about the transfer of wealth in our region and the powerful impact just capturing 10% of that wealth could have on our nonprofits and community.

The Transfer of Wealth data serves as a catalyst for creating the vision for what our community can be. It sets the stage for potential. It creates the scenario of "possibilities". It provides the basis for nonprofits to say: "We need to do this!" and: "Where do we start?"

Whether it is Pierce County, Thurston County or beyond, imagine the possibilities: More equitable access to education, health and social services. Greater economic opportunity. More arts and culture, parks and recreation facilities. A healthy environment and abundant natural resources. The list goes on.

We are excited to introduce an initiative called **Leave 10 South Sound**, designed to help individuals invest in the future of our communities through supporting nonprofits and the

causes they care about, and we invite **you** to be a part of it.

(Next slide)



Chris Serface:

Watch on Youtube: <https://youtu.be/lqjJsdmrQs>

Download Mp4:

<https://www.dropbox.com/sh/ioqf8lyb73fqIk1/AADqJmhmDZaa91If0AaS1TV2a?dl=0&preview=Leave+10+Testimonials+Chris+Serface.mp4>



Leave 10 South Sound –

aims to build better communities and transform ordinary people into philanthropists by educating, inspiring and encouraging individuals to aspire to leave 10% of their estate to charity.

Just imagine....

Rick:

The mission of Leave 10 South Sound is to build better communities and transform ordinary people into philanthropists by educating, inspiring and encouraging individuals to aspire to leave 10% of their estates to charity.

Leave 10 is a simple concept with the potential for enormous impact. Invite everyone to invest just 10% of their assets back into the community through an estate plan. Donors can do it now and see the benefit their investment brings, or, do it later when they no longer need the money to live on. Simple.

(Next Slide)



Leave 10 South Sound –

aims to build better communities and transform ordinary people into philanthropists by educating, inspiring and encouraging individuals to aspire to leave 10% of their estate to charity.

Just imagine....

Rick:

For nonprofit colleagues - You and I get to work for the good of our donors and our organization's mission. Each day we can impact people's lives in a positive way. But it is not often we have the opportunity to impact the entire community in which we live and the lives of current and future generations. Here is your opportunity to be involved in an initiative larger than organizational goals, much larger than just your own personal goals – an initiative that may literally change the way many perceive the community around us. That opportunity is wrapped into Leave10 South Sound.

For professional advisors working with clients, the same concept applies. You have a huge opportunity to introduce and include charitable giving as part of one's estate plan. The world needs experts who can help clients maximize the impact of philanthropy and make our communities better places to live for generations to come.

You will hear and see the word "Imagine" in this initiative. Take a moment now and **imagine** what it would take to build a strong, equitable, vibrant community and the role you can play in making that happen.

I'd like to introduce you to my friend and co-chair for this initiative, Evelyn Ryberg.

(Next Slide)



Thank you to our Partners:

**Greater Tacoma Community Foundation
Ben B. Cheney Foundation
Community Foundation of South Puget Sound
MultiCare Foundations**



National Chapters:
Leave10.org Leave 10 - Kitsap



Evelyn:

Thank you, Rick. Hello everyone. I'm Evelyn Ryberg, Sr. Director of Philanthropic Services with Greater Tacoma Community Foundation. We are so excited to share this initiative with you today. I

Before we continue, I wanted to take a moment to acknowledge and thank some valued partners who have embraced this initiative and financially supported our work: Greater Tacoma Community Foundation, the Ben B. Cheney Foundation, the Community Foundation of South Puget Sound, and MultiCare Foundations. Without their vision and support, this initiative would not be possible.

We also want to thank our National chapters: Leave 10 – the founding organization out of Seattle who created this initiative and has been influencing legacy giving in the Puget Sound region for over 8 years. They also generously shared their nonprofit and professional advisor toolkits with us. And, we thank Leave 10 Kitsap for sharing some of their resources. Leave 10 Kitsap is a collaborative effort started with a steering committee of 13 nonprofits in Kitsap County that launched a Leave 10 initiative just a little over 3 years ago and is still gaining momentum. This movement is really gaining traction in the entire Puget Sound region! You may also like to know that there is **national** interest in this movement. So, stay tuned.

One more thank you is in order, and that is to KBTC public television. They have been so gracious in filming the video testimonials you will be seeing throughout this presentation.

(Next slide)

Leave 10 South Sound Steering Committee



Initiative Co-Chairs:

Rick Oldenburg, CAP®, Executive Director
South Sound Planned Giving Council

Evelyn Ryberg, CAP®, Sr. Director of Philanthropic Services
Greater Tacoma Community Foundation

Evelyn:

Leave 10 South Sound is led by a devoted and incredibly talented steering committee. It is a diverse group of highly skilled, enthusiastic professionals from the nonprofit and professional advisor community that have committed a lot of their time and energy. Rick and I serve as lead co-chairs.

We created an initiative in a little over 9 months that would normally have taken 18 months or more. Many of our members serve on multiple committees. We appreciate their dedication and ongoing commitment to this effort.

As special shout out and huge amount of gratitude goes to Courtenay Chamberlin, our project manager. She is who kept us on track and on time and managed all the moving parts – which were a lot.

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Leave 10 South Sound Steering Committee

Nonprofit Outreach Committee:

Mindie Reule, CAP®, President and CEO, Community Foundation of South Puget Sound, *Co-Chair*

Doug Page, CAP®, Executive Director of Gift Planning, Pacific Lutheran University, *Co-Chair*

Vicki Brummond, MBA, Marketing and Communications Consultant

Dean Carrell, Executive Director, Pierce County Library Foundation

Katy Evans, Deputy Director, Hilltop Artists

Jennifer Hermann, Executive Director, Olympia Symphony Orchestra

Jonathan Jackson, MBA, Executive Director, Palmer Scholars

Carol Kowalski, CAP®, Dir. of Principal and Planned Gifts, YMCA of Pierce and Kitsap Counties

Rick Oldenburg, CAP®, Executive Director, South Sound Planned Giving Council

L. Denice Randle, Executive Director, Peace Community Center

Evelyn Ryberg, CAP®, Sr. Director of Philanthropic Services, Greater Tacoma Community Foundation

Sherri Stanton, Director of Development, KBTC

Evelyn:

I'd like to quickly acknowledge our steering committee members. We have three primary strands of outreach: Nonprofit outreach, Professional Advisor outreach, and Community outreach.

This group represents our nonprofit outreach committee. The co-chairs of this committee are Mindie Reule and Doug Page.

Rick and I support all of our committees. Other members include:

Vicki Brummond
Dean Carrell
Katy Evans
Jennifer Hermann
Jonathan Jackson
Carol Kowalski
L. Denice Randle
And Sherri Stanton

(Next slide)

Leave 10 South Sound Steering Committee

Professional Advisors Outreach Committee:

Beverly Cox, CAP[®], CFP[®], B. Cox Planning, *Chair*

Gary Brooks, CFP[®], BHJ Advisors

Regina Bellody, CAP[®], JD, VP, Wealth Advisor, Whittier Trust

Ken Ford, CAP[®], JD, LLM, Cultiva Law

Thomas Hong, JD, LLM, Fiduciary Counselling, Inc.

Robert C. Pittman, CAP[®], JD, Pittman Law Office

Rick Oldenburg, CAP[®], Executive Director, South Sound Planned Giving Council

Evelyn Ryberg, CAP[®], Sr. Director of Philanthropic Services., Greater Tacoma Community Foundation

Jeanne Sacks, CAP[®], CGMA, CPA, Johnson Stone and Pagano P.S.

Jonathan Sprouffs, JD, Connolly, Tacon & Meserve

Evelyn:

Our Professional Advisor Outreach Committee, chaired by Bev Cox includes:

Gary Brooks,

Regina Bellody

Ken Ford

Thomas Hong

Bob Pittman

Jeanne Sacks

And Jonathan Sprouffs

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Leave 10 South Sound Steering Committee

Community Outreach Committee:

L. Denice Randle, Executive Director, Peace Community Center, *Co-Chair*

Sherri Stanton, Director of Development, KBTC, *Co-Chair*

Helle Burlingame, Planned Giving Officer, The Evergreen State College

Sherrana Kildun, Chief Development Officer, Tacoma/Pierce County Habitat for Humanity

Rick Oldenburg, CAP®, Executive Director, South Sound Planned Giving Council

Evelyn Ryberg, CAP®, Sr. Director of Philanthropic Services, Greater Tacoma Community Fdn.

Lianna Olds, Deputy Director, Washington Nonprofits

Kari Young, Development Director, Lutheran Community Services NW

Evelyn:

This group is our Community Outreach Committee led by co-chairs L. Denice Randle and Sherri Stanton. Other members are:

Helle Burlingame

Sherrana Kildun

Lianna Olds

and Kari Young

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Leave 10 South Sound Steering Committee

Communications Committee:

Rick Oldenburg, CAP®, Executive Director, South Sound Planned Giving Council, *Co-chair*

Evelyn Ryberg, CAP®, Sr. Director of Philanthropic Svcs., Greater Tacoma Community Foundation, *Co-chair*

Vicki Brummond, MBA, Marketing and Communications Consultant

Beverly Cox, CAP®, CFP®, B. Cox Planning

Katy Evans, Deputy Director, Hilltop Artists

L. Denice Randle, Executive Director, Peace Community Center

Sherri Stanton, Director of Development, KBTC

Evelyn:

We also have a Communications Committee that is made of members of our other committees:

We are so grateful to all who have put so much time and effort into this initiative.

This initiative is young and has room to grow and we welcome those willing to put time and energy in this important mission. Please let me or Rick know if you would like to learn more, or get involved.

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Leave 10 South Sound Vision

- region-wide partnership
- increase philanthropic resources
- create a vision and build pathways
- our future is better together



Rick:

Some of us refer to the Leave 10 South Sound initiative as a movement. As we know, a movement is a group of people working together to advance their shared ideas. We see this as a movement toward a brighter future.

This initiative reaches all of the South Puget Sound region, including Pierce, Thurston, Lewis, and Mason Counties. As you saw by our steering committee, we have wonderful partners in the Community Foundation of South Puget Sound, Greater Tacoma Community Foundation, South Sound Planned Giving Council, as well as large and small nonprofits and allied professionals in the South Sound that want to be a part of this. What an **exciting opportunity** to spread the word and create regional partnerships. The more this is visible and talked about, the more it can gain momentum and ignite action.

The goal of Leave 10 South Sound is to increase philanthropic resources dedicated to meet the local challenges and opportunities of **today , tomorrow - and forever**. Our region's long-range transfer of wealth provides an opportunity for all of our donors to not only support their favorite causes, but provides an opportunity for donors to recognize their ability to address inequity and systemic change through legacy giving.

We want to create a **vision** of what our community can be and build the pathways to

achieve its potential. Leave 10 South Sound is here to help with that journey and we invite others to join us and help build that vision.

We believe our future is better **together**. It isn't about a committee doing all the work, or just a few organizations or individuals participating. It is about a collective, collaborative endeavor. Whether you are a nonprofit, professional advisor, or individual – we all have an opportunity to take part.

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Desired Outcomes:

- build **awareness**
- build **capacity and skills**
- increased **legacy gifts**
- help **clients reach their charitable goals**
- develop a growing network of **Champions**



Evelyn:

Here are some of the desired outcomes for this initiative.

- We want to **build awareness** throughout the region of the transformative power of charitable giving, and get everyone talking about it and taking action. It takes repeated messaging, from many sources.
- Many nonprofits are under-resourced or may not have the capacity or skills to manage a planned giving program. We provide **tools, resources and education** for nonprofits of **all** sizes and levels of experience to be successful in attracting and accepting planned gifts. And, we encourage those who are well-resourced and skilled to share their expertise and tools with others.
- With increased awareness and engagement efforts, organizations have potential for **increased legacy gifts**. And we hope it leads to more annual and major gifts during their lifetimes as well. Dr. Russell James of Texas Tech University and an expert on giving behaviors says that once someone makes a legacy commitment they are likely to increase annual gifts by 3 times.
- We hope to see Professional Advisors recognize Leave 10 as an idea that can appeal to the generous nature of their clients and help those **clients reach their charitable goals**

in a way best suited to their financial situation.

- We hope to inspire and develop a growing network of like-minded individuals who care about community. They are Nonprofit, Professional Advisor and Individual Champions who embrace this mission and are willing to spread the word to their networks and inspire others to Leave 10. Success is consistently growing our Champion list.

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Tools and Resources:

Website:

- Nonprofit toolkit
- Professional Advisor toolkits
- Resources for Individuals



SouthSound.Leave10.org

Rick:

We have provided a number of tools and resources to help nonprofits, advisors, and individuals accomplish their goals.

Here is what you will find on our website:

We have toolkits. Leave 10 Seattle graciously shared their nonprofit and professional advisor toolkits with us. The nonprofit toolkit is ideal for those organizations just starting out or in early stages of program growth. It offers guidance on all aspects of starting a planned giving program including templates and reference materials - all procured by seasoned gift officers.

Professional advisors have access to toolkits and other resources as well. The Leave 10 Advisor Toolkit is just going through a final edit and will be available in a couple weeks. A wonderful resource to share with clients is the Philanthropy Toolkit created by Stanford PAC Effective Philanthropy Lab. There are a number of tools that will assist advisors in having the philanthropic conversation.

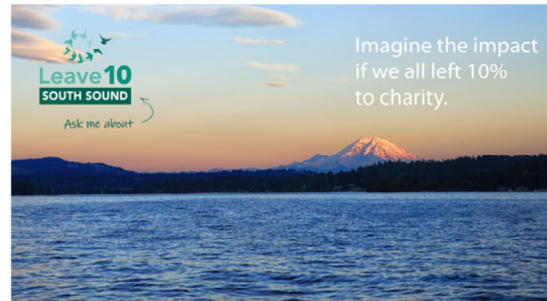
Individuals will find resources such as "Perspectives on Leaving a Legacy", "Getting Started with an Estate Plan", and "How to Make a Gift through Your Will or a Beneficiary

Designation". They will find connections to advisors and nonprofits. Another good reason to become a Champion.

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Tools and Resources:

- Marketing materials
logo, social media graphics, virtual background,
email footer, PowerPoint slide, handout
- Sample Legacy Society intro letter
- Pierce County Transfer of Wealth Study
- List of Champions and pledge forms



Rick:

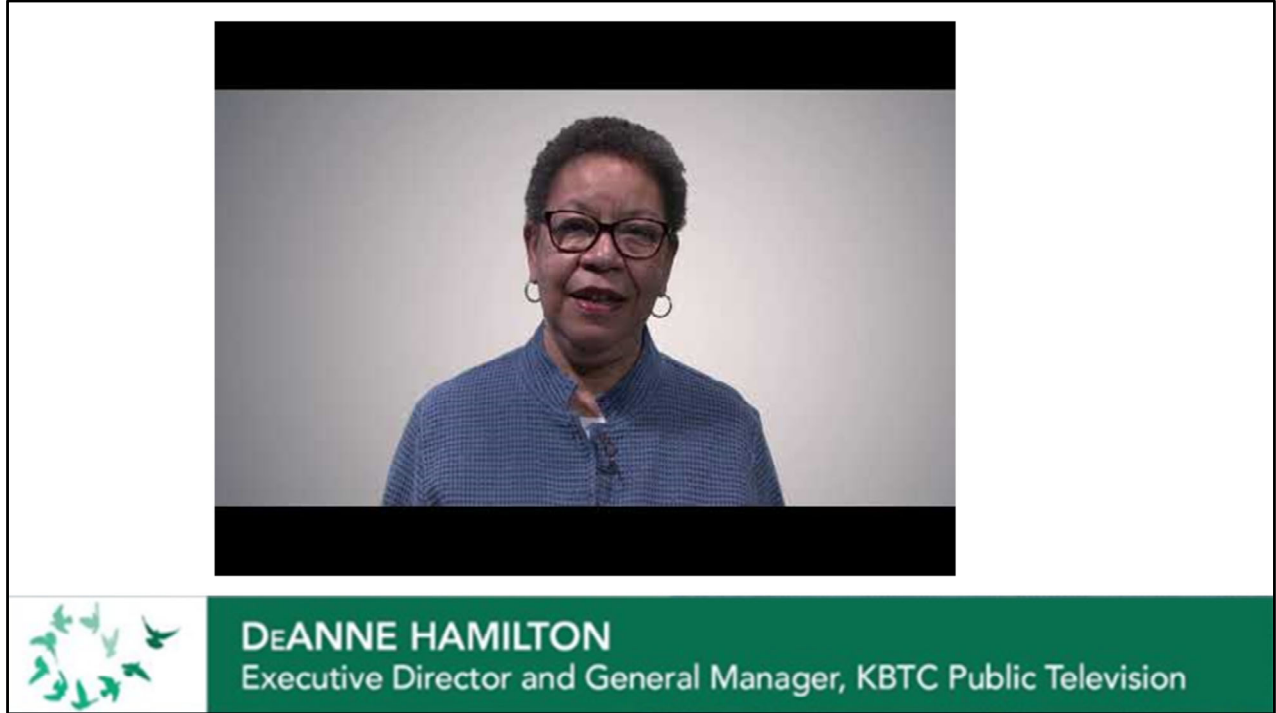
Also on the website you will find marketing materials that you can use and co-brand, including the Leave 10 South Sound logo, social media graphics, a virtual background, an email footer, a PowerPoint opening slide with script, and a Leave 10 South Sound handout that can be shared. We also offer a sample template you can use to invite people into your Legacy Society.

The Pierce County Transfer of Wealth report will be available. We are happy to share this information with nonprofits and others so they can use it to set vision and strategy for their planned giving efforts.

We want to recognize and celebrate our partners and Champions of this initiative. You will see the list of Nonprofit, Professional advisor and Individual Champions on the website. The Champion pledge form can be found in multiple spots throughout the website.

The website and its tools will evolve over time and grow with more tools and information. We especially want to grow our list of Champions and capture stories and testimonials. We hope **you** will go to the website often and introduce others to it so they can learn about Leave 10, access valuable tools, and sign on as Champions.

(Next slide)



DeAnne Hamilton:

Watch on Youtube: <https://youtu.be/KIPaciAlaM8>

Download MP4:

<https://www.dropbox.com/sh/ioqf8lyb73fq1k1/AADqJmhmDZaa91IfoAaS1TV2a?dl=0&preview=Leave+10+Testimonials+DeAnne+Hamilton+B.mp4>

Become a Nonprofit Champion:

Why would you want to be a Leave 10 South Sound Champion?

- be recognized as a **leader** in this movement.
- position your organization as a **catalyst** for a stronger, more vibrant community
- attract **more gifts**
- make our community a **better place**



SouthSound.Leave10.org

Doug:

Hello, I'm Doug Page, Executive Director of Gift Planning at Pacific Lutheran University. Mindie Reule, CEO of the Community Foundation of South Puget Sound isn't available to join us today. We are the co-chairs of the Nonprofit outreach committee. Our goal is to help nonprofits attract larger gifts, through education, networking and unified promotion. We want to emphasize that Leave 10 is not competing with you for donations, we are here to **support** you in attracting more donations.

In addition to developing tools, resources and educational opportunities to help build a planned giving program and expertise, we also want to build a network of Champions, dedicated to advancing this mission.

Why would you want to be a Leave 10 Nonprofit Champion?:

- To be recognized as a leader in this movement.
- To position your organization as a catalyst for a stronger, more vibrant community.
- To build deeper client relationships and attract larger and more impactful gifts for your organization.
- and to help strengthen all organizations and make our community a better place for generations to come.

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How to Use the Toolkit

You can either explore each section below or download the entire PDF. At the end of each section, there are resource links of samples and additional reading materials to explore. To access these resources, make sure that you have an internet connection.

[Download the Full Nonprofit Toolkit](#)

Explore the Toolkit Section by Section Below

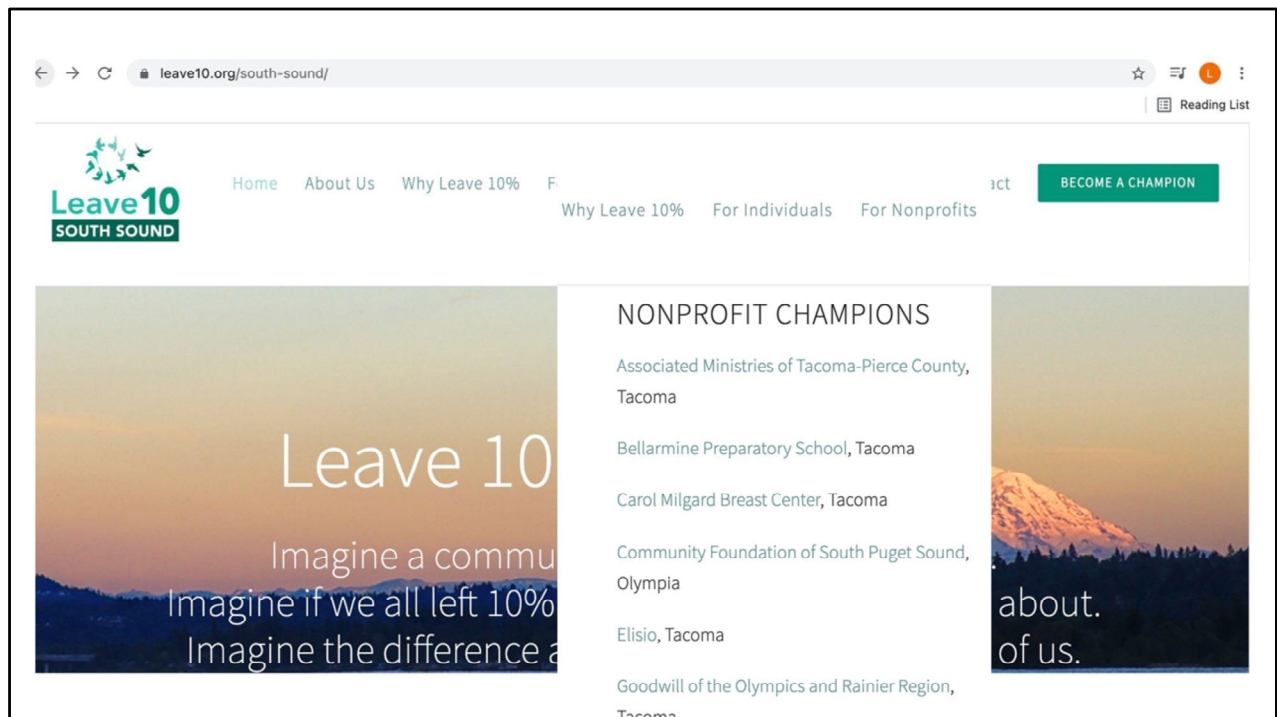


Doug:

There are benefits to becoming a Champion:

- You will have free and easy access to tools and resources to help start or enhance your planned giving program. Rick mentioned the nonprofit toolkit. You see an example here. The unique feature about the nonprofit toolkit is that you can open just sections of the toolkit that are of interest to you or download the entire toolkit as a reference guide. You will find information like: “How to Assess your Readiness” ; “How to Discuss Planned Gifts”, and “Starting a Legacy Society”. Many of you may already be using tools provided by PGCalc, Crescendo, Stelter or other programs. Our toolkit wasn’t designed to replace what you are already using. It is for those who may not have access to those tools, or supplement the tools you already have.
- You will have enhanced educational opportunities. We will invite local and regional experts to present on planned giving topics.
- You will have access to the Transfer of Wealth Study
- You will have access to a volunteer mentorship program staffed entirely by local nonprofit champions, like yours truly, to help smaller organizations needing a little extra assistance with establishing their planned giving programs. Mentors are listed on the website. For anyone interested in being a mentor, please let us know.
- There is **no** membership fee to be a part of the Leave 10 South Sound initiative.

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Doug:

By becoming a Nonprofit Champion, your organization gets recognition on the Leave 10 South Sound website and Leave10.org website giving your organization more visibility. Here is an example of some Nonprofit Champions on the site.

To become a Champion, Just go to the website and click the “Become a Champion” button and complete your organization’s information. You may want to have the CEO or Executive Director of your organization sign the pledge or you might want your Director of Development or Philanthropy Team Lead sign up. If you really want to make a statement, have your whole development team sign up. Just make sure your organization’s leadership supports it.

We also encourage you to sign on as an Individual Champion, making your own personal commitment to leave 10.

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Become a Nonprofit Champion:

Take Action:

- launch or refresh your planned giving program
- utilize tools and marketing pieces
- engage your board, donors and partners
- build your legacy societies
- share your stories and testimonials

Leave10SouthSound@gmail.com



SouthSound.Leave10.org

Doug:

Now, it's time to take action:

- Launch or refresh your Planned Giving Program. If you are new to planned giving, start simple and grow from there. It doesn't have to be fancy.
- Utilize the free toolkits and marketing pieces offered by Leave 10. Co-brand your materials with the Leave 10 logo to build even greater awareness of the impact of legacy giving in our community.
- Engage your staff, board members, donors, volunteers and other partners as ambassadors. Encourage them to take the pledge too.
- Build your Legacy societies. Many of you are in capital campaigns right now. How about asking your donors if they would like to be a part of sustaining your organization and its important programs for years into the future? Now is a perfect time to ask for legacy commitments.
- Share your impact stories and testimonials with us so we can give greater visibility to your organization and the great work you are doing. We want to hear about the outcomes of your efforts – your successes, best practices, and mistakes. Let's continue to learn from each other. You can easily communicate through the Contact Us section of our website or email Leave10SouthSound@gmail.com.

If you have questions or need help... give me a call.

Thank you!

(Next slide)



Gary Brooks:

Watch on YouTube: <https://youtu.be/OyhQaS8UC1o>

Download MP4:

https://www.dropbox.com/s/roofyjsduhz11he/Leave%2010%20Testimonials_Gary%20Brooks_v5.mp4?dl=0

Become a Professional Advisor Champion:

Why engage in Leave 10 South Sound?

- amplify clients' philanthropic impact
- deepen client relationships
- meet client expectations
- secure next generation relationships
- more impact in community



Bev:

Hi, I'm Bev Cox, CAP and Certified Financial Planner. I am the Chair of the Professional Advisor Outreach Committee of Leave 10 South Sound.

We want to support and celebrate those advisors who are committed to advancing philanthropy through their practice and are helping clients include charitable giving in their estate plans.

Whether you are a wealth advisor, CPA, or estate attorney, there are so many reasons you should want to engage in this mission and make it an integral part of your practice. Why?

- You are amplifying your client's philanthropic impact, and at the same time, sharing in the pride and joy of this experience.
- You are deepening your relationship with your clients as you serve as a trusted advisor.
- Set yourself apart. Many studies performed over recent years say clients want and expect their advisors' guidance in helping them achieve their philanthropic goals. This is your chance to meet those expectations.
- You are opening doors to securing relationships with the next generation by involving them in charitable activities, estate conversations and giving decisions.
- and your commitment to spreading the message of Leave 10 will grow the potential

impact of **all** our efforts, exponentially. A win for our community.

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Become a Professional Advisor Champion:

As a Champion, you are:

- **investing in the future** vibrancy and health of our community
- engaging in **charitable conversations** with clients
- serving as **ambassadors**
- **leading** by example

Benefits:

- recognition as a Leave 10 Professional Advisor Champion
- invitation to share a testimonial
- educational events and programs
- tools and resources



SouthSound.Leave10.org

Bev:

As **Champions**, you are investing in the future vibrancy and health of our community through your actions.

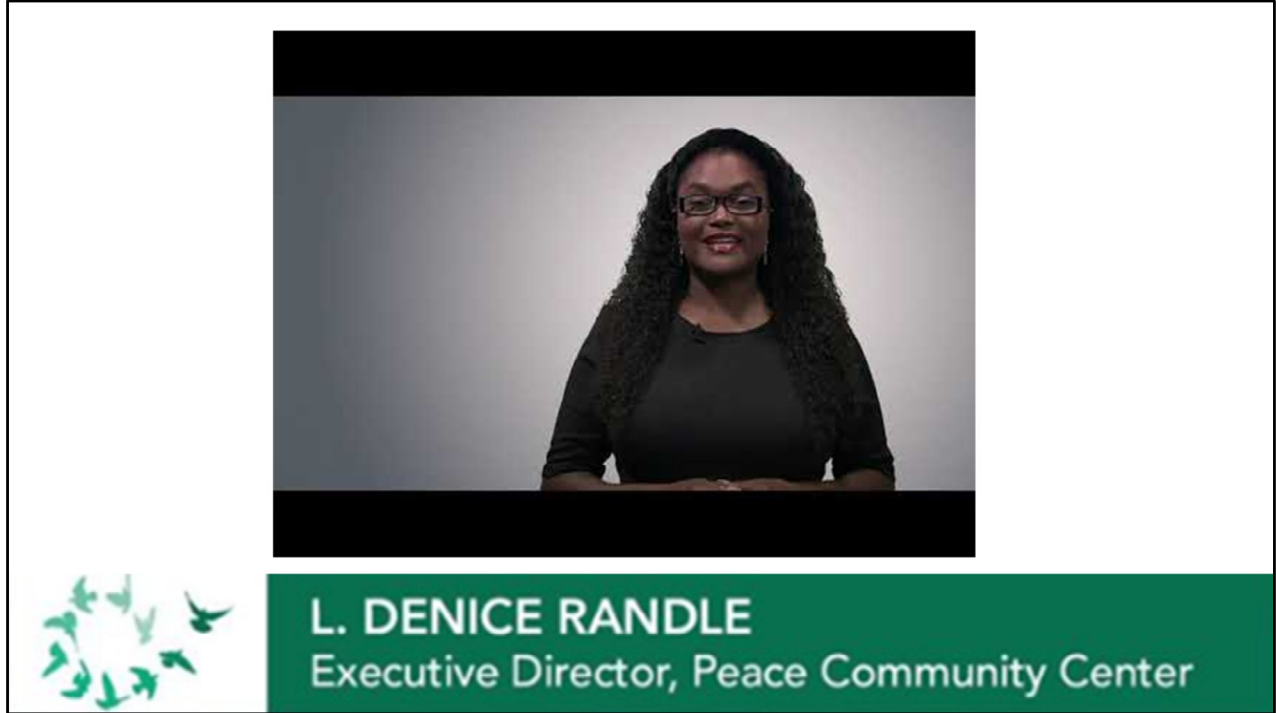
- You are having robust conversations with clients regarding their charitable goals and helping them establish legacy gifts through their estate plans.
- You are serving as ambassadors by sharing this mission with your colleagues, clients, family and friends.
- In addition to taking the Professional Advisor pledge - we encourage you to lead by example by making your own personal pledge to leave 10% of your own estate to charities and causes you care about.
- We will celebrate and recognize **you** as a Champion on our website. It will include a link to your profile at your firm.
- We invite you to share a testimonial.
- There will be educational events and programs you can participate in. You may even be invited to be a presenter at future events on planned giving or estate planning.
- And there are great tools and resources on our website that you may find useful in your work, including guides on having the philanthropic conversation - something many advisors ask for.

Join me and my Leave 10 colleagues in this valuable and life-enriching mission, by taking the **Professional Advisor** pledge. I invite you to take the **Individual** pledge as well.

If you have questions or want to become more involved with our Professional Advisor outreach activities, please contact me.

Thank you!

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L. Denice Randle

Watch on YouTube: <https://youtu.be/36cRE7ETPuc>

Download MP4:

[https://www.dropbox.com/sh/o0hjh0bfqr7c0fm/AACQYvTv6btQvD5XeyNbMCzka?dl=0&preview=Leave+10+Testimonials L+Denice+Randle A v4.mp4](https://www.dropbox.com/sh/o0hjh0bfqr7c0fm/AACQYvTv6btQvD5XeyNbMCzka?dl=0&preview=Leave+10+Testimonials+L+Denice+Randle+A+v4.mp4)

Become an Individual Champion:

What does it mean to be an Individual Champion?

- investing in the future vibrancy and health of our community
- adding a charitable intention to a beneficiary designation, will, or trust
- being an ambassador and inspiring others



SouthSound.Leave10.org

Denice:

Hello, I'm L. Denice Randle, Executive Director of Peace Community Center and co-chair of the Community Outreach Committee of Leave 10 South Sound.

Our outreach committee's work is to create awareness throughout the broader community of the power of legacy giving and its impact on community.

In addition to providing resources for individuals to help plan their legacy we will be offering presentations and educational opportunities. You might see us doing a Leave 10 presentation at a Rotary Club or set up an information table on "Estate planning" at a local library. We invite you, our nonprofit partners and advisors, to collaborate with us in putting on some of these events or helping create these awareness opportunities. This gives more visibility to you and your organization as well.

Sherri:

Hello, I'm Sherri Stanton, Director of Development at KBTC and co-chair of the Community Outreach Committee with Denice.

Denice did a beautiful job in her video telling you what it means to be an Individual Champion. We'd like to share some more thoughts on what it means to be an Individual Champion:

- Champions are investing in the future vibrancy and health of our community through leaving a legacy gift to charities they love.

Anyone can be a Champion. You don't have to be rich or have a large estate to leave a legacy gift. You can even "aspire" to leave 10%. Some people need to start with a smaller commitment and grow their commitments over time. We want to celebrate those who have embraced the mission and have taken action.

- A Champion needs to make their commitment through a bequest in a Will or trust - or, simply add a charity to a beneficiary designation of an IRA, retirement plan or insurance policy. We do encourage individuals to work with their advisors and let charities know their intentions.

Leave 10 doesn't ask individuals to disclose what charities they intend to support or amounts they intent to give.

- Individual Champions are ambassadors, setting an example for others and inspiring friends and family to support their community, too.

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Become an Individual Champion:

Benefits:

- information about estate planning and charitable giving
- recognition as a Leave 10 Individual Champion
- recognition by the organizations you support
- You will feel great!

"It is a joy and a shared responsibility to provide tailwinds for those who might have not had the opportunities we've experienced. We applaud the Leave 10 initiative and look forward to passing along a majority of our estate to others." - Todd and Teresa Silver



Denice:

For Individual Champions ...

There are helpful resources about estate planning and charitable giving on our website.

We will recognize Individual Champions on our website and capture testimonials to inspire others.

And, we hope that the nonprofit organizations who benefit from legacy commitments will honor and recognize their donors.

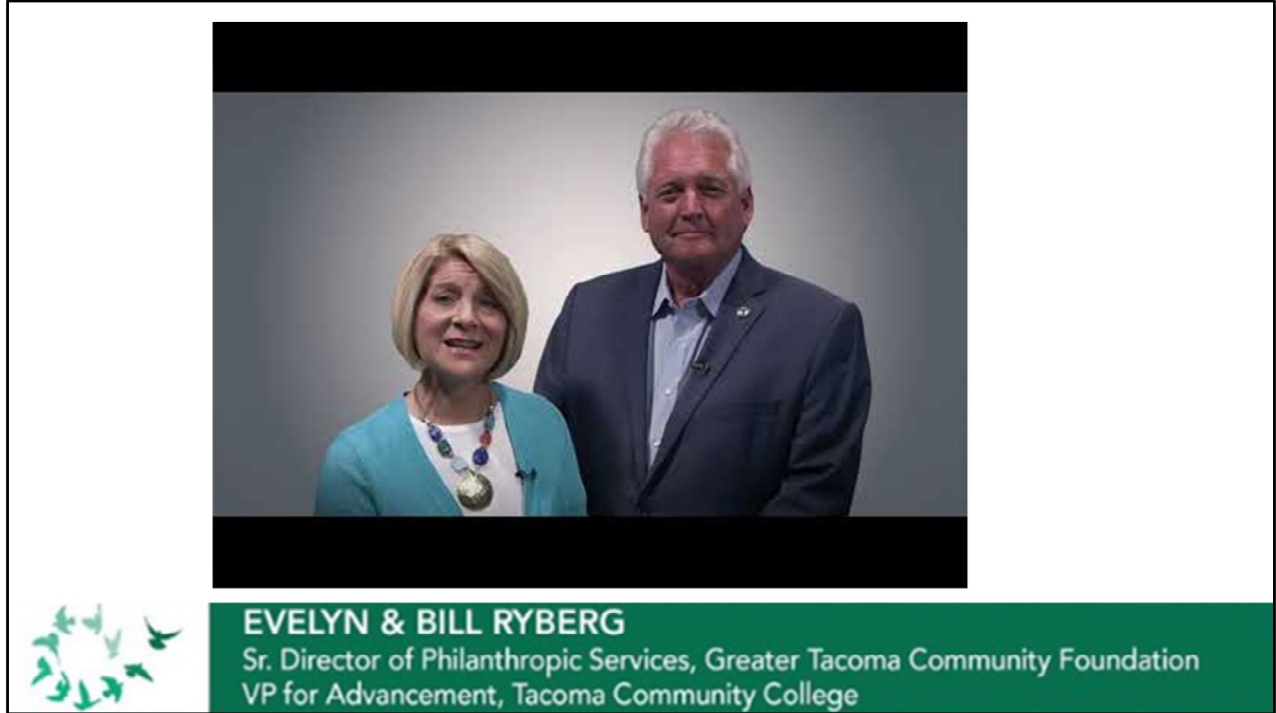
Most importantly, Individual Champions will feel **great** about supporting the charities they love and set the stage for a bright future for our community.

Please join us in becoming Individual Champions.

If you have questions or would like to learn more about how you can be more involved in our community outreach efforts, please contact me or Sherri.

Thank you.

(Next slide)



Evelyn & Bill Ryberg:

Watch on YouTube: <https://youtu.be/cp3kp9PK-SI>

Download MP4:

<https://www.dropbox.com/sh/o0hjh0bfqr7c0fm/AACQYvTv6btQvD5XeyNbMCzka?dl=0&preview=Leave+10+Testimonials+Rybergs+v3.mp4>



Upcoming Events:

Planned Giving for Generalists Series
 South Sound Planned Giving Council
 October 8 – December 3, 2021, 12:00 - 1:00 pm
 Cost \$45 for SSPGC or WPGC members
 or \$95, includes 1 yr. SSPGC membership
<https://sspgcouncil.org/events-page/>

Transfer of Wealth Study and Leave 10 introduction with panel discussion
 Tacoma Estate Planning Council
 October 12, 2021, 12:00 – 1:00 pm

2021 Practical Planned Giving Conference by Crescendo
www.ppgc2021.com
SouthSound.Leave10.org

Rick:

We have multiple educational opportunities coming your way in the next few weeks and months. Many of them are presented by Leave 10 South Sound and many will be presented in collaboration with other partners such as South Sound Planned Giving Council, Community Foundations, or other philanthropic partners. Some will be free, some will have a small cost. All will have a **big** return.

You will find our events on the website. And, we will be sending notifications through emails. To be included in invitations for these educational gatherings, please become a Champion, or subscribe to the newsletter which will add you to our contact list.

First up is the Planned Giving for Generalists Series, presented by South Sound Planned Giving Council, which begins at noon on October 8th and is just 1-hour long. It is a 7-week course designed for individuals just starting out or wanting to refresh their knowledge about the basics of planned giving. There is a small cost of \$45 for members of South Sound Planned Giving Council or Washington Planned Giving Council or \$95 for non-members, which also includes membership for the rest of this year **and next year** to SSPGC. Sessions are designed to get you comfortable with Planned Giving. Please contact me or sign up on the new South Sound Planned Giving Website. **It is well worth the investment!**

Professional advisors: On October 12, members of the Leave 10 Committee will be doing a presentation to members of the Tacoma Estate Planning Council. We will start with the Transfer of Wealth study and introduction to Leave 10 South Sound and hold a panel conversation about charitable giving in financial and estate planning.

There will be many other learning opportunities in the future related to planned giving. We will have “How to talk about planned gifts with donors” and “Marketing your planned giving program” just to name a few.

Finally, Leave 10 will alert you to externally-hosted professional development opportunities as well. There are so many great programs to take advantage of: The 2021 Practical Planned Giving Conference presented by Crescendo has already launched this month but it has multiple programs over the next several months. This year their webinars are free.

Stelter, PGCalc, Free Will, and Bryan Clontz of Charitable Solutions also offer excellent educational programs and we will be sure to share them out. We also ask that you share with us any relevant educational opportunities that you may be hosting so we can make them more visible.

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Call to Action:

- Become a Champion!
- Help clients with charitable planning
- Start or enhance your existing planned giving program
- Utilize toolkits and attend learning opportunities
- Collaborate
- Spread the word - **have fun!**



SouthSound.Leave10.org

Evelyn :

You've now heard about Leave 10 South Sound. We hope this gets you excited and motivated to roll up your sleeves and make things happen. While we continue to learn and build we can **all** start doing something now.

- First, Become a Champion. Complete the pledge form now. Before the end of this session we would love for **every one of you** to hop on the website and take the pledge. Don't wait. Lead by example and get recognized for it. Experience the joy of giving and inspiring others.

Advisors – Your clients want your guidance and expertise in helping them achieve their charitable goals. You are in a unique position to bring awareness of the impact charitable giving can make in the community, and it can be done in a way that still supports family and loved ones. Statistics say that of those who have estate plans, only around 8% give to charities. Let's change that statistic. Let's educate our community of the importance of creating a will or trust to protect family, assets, and support our community.

Nonprofits - Get started with your planned giving program or refresh and expand what you have to reach broader audiences and achieve greater results. Consider a "make a will" month or endorsing National Estate Planning Awareness Week every October to get your

donors motivated in completing their estate plans. Consider co-presenting a Leave 10 or estate planning presentation to donors . Get creative!

- Start or grow your Legacy Society program. Honor and steward those that have made commitments to support you. Legacy gifts are often your largest, most impactful gifts your organization will receive.
- Utilize the nonprofit and professional advisor toolkits and the marketing resources that we provide. We are here to help you find what you need, and if you don't see it, let us know what you do need. There are tons of other resources out there to help support your work. And if you have something better, and are willing to share, please do so.
- Attend learning opportunities to fine tune your skills and knowledge. Go beyond yourself and invite a colleague or someone who might be new to planned giving or new to our nonprofit community.
- Reach out to partners and **collaborate**. You're not in this alone and don't need to be an expert at planned giving. We can all support each other. Mentors can provide tips and best practices. Your community foundation can be a great help in accepting planned or complex gifts that you wouldn't normally accept, or assist with administering endowments. Invite professional advisors to be on your board or gift acceptance committees.
- True Champions are ambassadors. **Spread the word and keep the movement going!**
There is strength in numbers.
- Most of all - **Have fun!**

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Rick:

Let's all help write the next chapter for our communities.

We can all participate in Leave 10. We can all be Champions. We can guide and assist others in Leaving 10 and set the course for a brighter future.

With a little planning, legacy gifts will make a big difference in our community.

Let's make a lasting impact and leave a legacy!

Thank you!

Our time for this session is limited so we will not have time for Q & A. However, we do want to answer any questions you might have. Please send us an email at Leave10SouthSound@gmail.com.

We now look forward to having breakout conversations to talk more about Leave 10 and its implications for us as individuals, nonprofits and advisors – and especially for our South Sound communities we support and serve. We look forward to robust and enthusiastic discussions. Those who indicated they will participate when they registered, received a room assignment via Email. If you DID NOT sign up at registration, but now want to know more about this initiative and how you can participate, we will

assign you to a room, just hang out in the main ZOOM room. **WORD OF CAUTION** - once on the ZOOM platform, you will need to completely log out of REMO or your video will not work. If you've logged out of REMO and are still having an issue with your video, try clicking your video button off and on.

Just a reminder to our facilitators to assign a note taker and send all notes and feedback to Leave10SouthSound@gmail.com.

You will now be directed to transition to your breakout room via Zoom. Now I had it over to our event managers.

(Put the request for a note taker and where to send the feedback in the chat and in the Zoom breakouts also. Leave10SouthSound@gmail.com)

(End slide show presentation)