



LEAVE A LEGACY

2006-2007 SPONSORSHIP COMMITMENT FORM

We are grateful for your commitment to LEAVE A LEGACY® and want to accurately recognize your support.

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SPONSORSHIP LEVELS

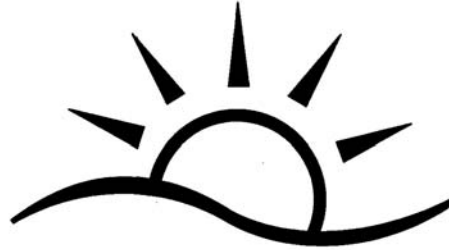
Program Sponsor	_____	\$10,000
Underwriting Sponsor	_____	\$ 5,000
Supporting Sponsor	_____	\$ 2,500
Sustaining Partner Sponsor	_____	\$ 1,000
Partner Sponsor	_____	\$ 500

Signature: _____

Please return this form by fax to (305) 661-2221 to confirm your commitment or mail your form and check made payable to **LEAVE A LEGACY®** to:

LEAVE A LEGACY®
c/o Chase Marketing Group
1320 South Dixie Highway, Suite 841
Coral Gables, FL 33146

For more information, please call Edwina Lau at elau@chasemiami.com or call (305) 663-7105.



LEAVE A LEGACY

*A Program of the Planned Giving
Council of Miami-Dade County*

**2006 – 2007
SPONSORSHIP
PACKAGE**

A Project of the Planned Giving Council of Miami-Dade County
www.plannedgivingmiami.org

Background

LEAVE A LEGACY is a community program to:

- assist **nonprofit organizations** to implement and enhance charitable planned giving programs and spread the word about philanthropy
- educate **professional advisors** about planned giving and philanthropy
- promote philanthropy and planned giving to the **general public**

LEAVE A LEGACY does not solicit gifts for any particular organization. It is a cooperative effort to increase charitable giving for all nonprofits.

LEAVE A LEGACY accomplishes its mission by encouraging members of the general public to create a legacy through charitable giving. The LEAVE A LEGACY message is delivered through a multi-year public awareness campaign, implemented by a collaborative effort of fundraisers, donor advisors, charities and funders.

LEAVE A LEGACY started as an initiative of the Planned Giving Council of Miami-Dade County in 1997. There are LEAVE A LEGACY Chapters in over 150 cities. The Planned Giving Council of Miami-Dade County, is a nonprofit organization comprised of planned giving officers, other nonprofit development officers, and other professional advisors such as attorneys, CPAs, CLUs, CFPs, trust officers and other professionals involved in estate and financial planning, who share the goal of promoting philanthropy in Miami-Dade County.

Some of the projects of the Miami-Dade LEAVE A LEGACY campaign include:

- a special "Giving" section in the *Miami Herald* devoted to philanthropy and charitable giving distributed in the Fall on National Philanthropy Day
- educational outreach programs for nonprofits (particularly those who are just starting a planned giving program) such as the conferences on "How to Start a Bequest Program" and "Tools of the Trade"
- educational outreach to allied professionals to encourage them to incorporate charitable giving into their practices and display the LEAVE A LEGACY brochure
- the *Donor Next Door* program to help participating nonprofits reach their current (and potential) donor community
- the *Family Album* publication distributed at the annual *Donor Next Door Luncheon* in the Spring honors the outstanding work of our community's nonprofits and their generous donors
- the *NonProfit Reference Manual* to provide local nonprofits technical resources on areas of concern for nonprofits such as board liability and tax concerns
- *Chartered Giving Plans*, an easy to read brochure to assist nonprofits in their planned giving efforts

and other projects, events, publications and efforts designed to:

- spread the word that "Everyone can be a philanthropist"
- increase charitable giving; and
- help make South Florida a better community



2006 - 2007 Program

Why LEAVE A LEGACY? LEAVE A LEGACY does not have the resources to generate, gather or track the hard data to show planned giving trends in South Florida. However, South Florida philanthropy suffers in comparison to other similar sized demographic regions. Based on the ten-year LEAVE A LEGACY project experience, this is at least partially attributable to lack of: (1) public awareness about charitable giving; (2) incorporation of gifting techniques among donor advisors; (3) expertise and capacity among many smaller nonprofits; and (4) collaboration and cooperation between and among nonprofit organizations, the private sector and the media.

Target Population and Benefit: The nonprofit community in general; and smaller, minority, underserved and otherwise under-supported nonprofits in particular. The eight-year LEAVE A LEGACY experience has shown that many South Florida nonprofits do not have the expertise or resources to adequately or efficiently process or encourage planned gifts. Many of the latter have no planned giving (or even bequests) program in place. Some are not even aware of the potential from planned gifts and bequests. By mentoring these organizations, showing them how to initiate and implement a planned giving and bequest program, making published resources available to them which they could not otherwise afford, facilitating partnerships with professional advisors and the private sector, and by increasing awareness about planned giving and philanthropy in general, we hope to help more nonprofits escape the cycle of diverting their resources from their primary mission to the constant struggle to remain financially afloat.

What Are the LEAVE A LEGACY Goals for 2006 - 2007?

- informing the public about the benefits of philanthropy
- educating professional advisors how to help their clients become philanthropists
- educating board of directors and development staff of nonprofits about charitable giving

Calendar for 2006 - 2007:

- Kickoff - November 14, 2006
- Professional Advisor Outreach - TBD
- Exempt Organization Education Program - March 8, 2007
- Annual Luncheon and Donor Next Door & Professional Advisor of the Year awards presentation as well as the unveiling of the 2007 *Family Album* - May 17, 2007

2006 - 2007 Projects:

- **Survey** of nonprofit organizations to provide a better assessment of their needs
- Further development of a formal and informal **mentor network** to guide smaller nonprofits in establishing their planned giving programs and assisting them through the minefield of compliance with government laws and regulations
- Enhancement of our **Speaker's Bureau** and outreach, personal appearances and communications to grass roots, minority and cultural nonprofit organizations
- Update **resource materials** (i.e., brochures and newsletter articles for donors) to assist smaller nonprofits

Relationship to Other Community Efforts Addressing Similar Needs: LEAVE A LEGACY is a collaborative effort with a demonstrated history of cooperation and partnership with people and organizations sharing similar goals. Virtually all of LEAVE A LEGACY's activities involve partnerships with nonprofits who recognize the need to promote philanthropy in general, charitable foundations supporting philanthropic activities, and those in the private sector and the media with similar goals. Through initiatives, such as The Donor Next Door program, LEAVE A LEGACY helps smaller nonprofits develop recognition programs for their donors. LEAVE A LEGACY serves as a resource, providing technical assistance, speakers and materials to help nonprofits not just to raise funds but to develop a higher degree of self-sufficiency. Finally, rather than competing against other nonprofit activities, LEAVE A LEGACY helps to promote them.

Expected Outcomes: Specifically: (1) greater participation in the mentoring and speaker's bureau programs; (2) more contacts with smaller nonprofit organizations; (3) greater usage of expertise and publications by smaller nonprofits; (4) refocusing of efforts as needed based on survey responses; (5) implementation of website and use by smaller nonprofits; (6) greater attendance at conferences, seminars and workshops; and (7) coordinating and leveraging resources with other Florida LEAVE A LEGACY programs.

In general; (1) greater cooperation and collaboration between and among nonprofit organizations, allied professionals, the private sector and the media in the promotion of philanthropy; (2) greater awareness of planned giving among smaller nonprofits, allied professionals, the media and the general public; and (3) a general increase in philanthropy and community building in South Florida.

Funding

The total cost of the 2006 - 2007 LEAVE A LEGACY program is less than \$75,000, excluding volunteer time. Our sources of support include: (1) banks, trust companies and other financial institutions; (2) nonprofit organizations; (3) professional entities such as accounting, financial planning and law firms, insurance companies, securities traders and private foundations.

Sponsorship Opportunities

Recognition for **LEAVE A LEGACY Partners** will reach the top tax, estate planning, financial and nonprofit professionals in South Florida, all known Miami-Dade County nonprofit donors and the general public through the events, programs, publications, communications and promotional materials.

Sponsorship Opportunities: Summary of Benefits

Category	Investment	Recognition
Program Sponsors	\$10,000	<p>Prominently positioned reserved table with firm name displayed at Annual Luncheon</p> <p>Free admission (10) to all mini-conferences, workshops and events</p> <p>Presenting Sponsor level special recognition at podium at all events</p> <p>Name & logo on front of all invitations</p> <p>Media releases and related publicity</p> <p>Presenting Sponsor level mentioned in all brochures and publicity</p> <p>Exclusive pre-event meeting with speaker and publicity photos</p>

Underwriting Sponsors	\$5,000	<p>Reserved table with firm name displayed at Annual Luncheon</p> <p>Free admission (5) to all mini-conferences, workshops and events</p> <p>Underwriting Sponsor level special recognition at podium at all events</p> <p>Name in all invitations</p> <p>Media releases and related publicity</p> <p>Underwriting Sponsor level mentioned in all brochures and publicity</p>
Supporting Sponsors	\$2,500	<p>Free admission (2) to all mini-conferences, workshops and events</p> <p>Five reserved seats at Annual Luncheon</p> <p>Supporting Sponsor level special recognition at podium at all events</p> <p>Name in all invitations</p> <p>Media releases and related publicity</p> <p>Supporting Sponsor level mentioned in all brochures and publicity</p>
Sustaining Sponsors	\$1,000	<p>Free admission (1) to all mini-conferences, workshops and events</p> <p>Two reserved seats at Annual Luncheon</p> <p>Sustaining Sponsor level special recognition at podium at all events</p> <p>Name in all invitations</p> <p>Media releases and related publicity</p> <p>Sustaining Sponsor level mentioned in all brochures and publicity</p>
LEAVE A LEGACY Partners	\$500	<p>Name listed on promotional materials, including</p> <ul style="list-style-type: none"> • Three program invitations <ul style="list-style-type: none"> • 2 non-profit planned-giving mini-conferences • 1 LEAVE A LEGACY luncheon • Media releases and related publicity • Sustaining Sponsor level mentioned in all brochures and publicity



For more information, please contact:

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Steering Committee

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