



*An Affiliate of Central Kansas Community Foundation*

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## **How to Identify Prospects for Endowment Gifts**

Large gifts of endowment are normally gifts of assets and are not taken from current income. The following are characteristics of individuals who might be prospects for such endowment giving.

1. **Milestone** - generate thoughts about our own morality. Milestones make a donor think about what they have done in their life and whether they would like to see that work continue on and be permanent. The following are examples of milestones that might indicate a potential donor is thinking about giving endowment.
  - retirement
  - sold business
  - first grandchild
  - income windfall
  - first time and last time writing a will
  - kids out of college
  - job promotion
  - death of friend or relative
  - divorce
  - significant birthday
2. **Habitual givers** - they give annually to one or a variety of causes.
3. **Devotion to a specific cause** - whether by volunteering, campaigning or giving to a specific cause, the donors' identity is closely linked with a specific organization of cause.
4. **Desire for permanency** - donors want to be remembered for their devotion to the cause, their past giving, or a milestone.
5. **Estate or current tax concerns** - donors who are philanthropic, but also may have a financial need to make a gift. For example, donors with highly appreciated assets such as property, stocks, or collections. Also, donors who may be considering selling their business.
6. **No heirs** - donors in this position have a choice to make. They can give their assets to charity, or they can give them to the government.

Although these are general characteristics, there are certainly many other reasons why individuals choose to make gifts of endowment. Also, it's important to remember that prospects for endowment gifts may not have all, or even several, of these characteristics.

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