



## **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 Opportunities**- Milestones make a donor think about what they have done in their lifetime and whether they would like to see that work continue 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 or cause.
4. **Desire for Permanency** - donors want to be remembered for giving, for a personal milestone, and/or for their devotion to a cause.
5. **Estate or Tax Concerns** - donors are philanthropic, but also may see a financial advantage to making a gift. Some examples: donors with highly appreciated assets such as property, stocks, or collections; those considering selling a business.
6. **No Heirs** - donors in this position have a choice to make: They can choose which charity to benefit, or their wealth will be realized by the IRS.

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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