

## **Catholic Gift Annuity Program General Fundraising Actions and Procedures**

### **Marketing to Create Awareness**

- Distribute brochures to educate donors, pastors and parish personnel
- Include gift annuities in fundraising materials; include link to Catholic Gift Annuity website
- Use direct mail approach for selected potential donors
- Advertise annuity in weekly bulletin/diocesan newspaper
- Host planned giving information sessions highlighting annuities

### **Handling Inquiries and Proposals**

- Discuss donor's planned giving wishes
  - Income need
  - Tax circumstances
  - Desired legacy
- Provide benefits and features of Catholic Gift Annuities
  - Financially strong program backing up lifetime payments and opportunity for higher residuum
  - Payout (from rate table or online calculator)
  - Variety of contract and payment options to consider (single, two lives, deferred)
  - Options for donation: cash, stock
  - More information available on website
- Provide gift annuity proposal for consideration
  - Create document using fundraiser support website
  - Donor could generate from public website
  - Catholic Extension could email document
- Follow up with donor to complete application
  - Phone support from Catholic Extension, if necessary

### **Finalizing Donation and Completing Contract**

- Determine with donor how to receive donation
  - Fundraiser accepts check and application and forward to Catholic Extension
  - Donor sends check and application directly to Catholic Extension
- Catholic Extension confirms information and payout on application Catholic Extension prepares contract and sends to fundraiser or directly to donor, depending on instructions
- Fundraiser follows up with donor, to thank for gift and answer any questions before annuity payment are received

### **Post-donation Annuity Administration**

- Payments will be from "Catholic Extension" to bank account, not from Catholic Gift Annuity or Diocese, Foundation or Parish
- 1099 forms will be sent to donor by end of January each year
- Quarterly activity report sent to diocesan contact
- Annual Annuity market value and liability reports available to diocese
- Address and bank information changes are sent directly to administrator