

CELEBRATING A YEAR OF SUCCESS FOR AREA NON-PROFIT ORGANIZATIONS

March is “Leave a Legacy Month”, denoting a year of accomplishment and only the beginning of making a difference for area charities on Florida’s Treasure Coast. Leave a Legacy® has been successful in heightening both the public awareness of planned giving as well as educating potential donors about different charities. They have also made accessible the resources potential donors need to give to their favorite charity – whether the donation is for the benefit of children, animals, the arts or the environment, or any number of other worthy causes. Thanks to Leave a Legacy®, area organizations are beginning to see exciting results.

The Florida Oceanographic Society, Boy’s and Girl’s Club of Martin County, and Hospice of the Treasure Coast are just three examples of local charities that have begun to receive substantial donations and are encouraged that this compelling concept will bring hope for a better future to their respective organizations.

“Once donors make arrangements for planning giving, they become part of our family,” says **Nancy Perry, Director of Development for the Florida Oceanographic Society**. She goes on to say, “Donors develop an emotional investment in the Society resulting in not only a planned gift, but often choosing to make an unsolicited annual contribution as well.” Perry also stated that in light of this new and exciting concept they have developed a planned giving committee to assist a number of new, potential donors that have come forward after being introduced to the legacy giving. Ms Perry concludes, “I specially can’t thank **James Campo, Certified Financial Planner and president of**

the Treasure Coast Planned Giving Council (TCPGC), enough for his individual attention in assisting us in putting our planned giving program in motion.”

Sue McVeigh, Chief Development Officer for Martin County Boy’s and Girl’s Club said Leave a Legacy® has had a tremendous positive impact on their organization. With more and more planned donations on the way, she stated they are now developing a “Legacy Society” in appreciation of those who have planned a donation in advance. Members receive newsletters, an annual report, and thankful recognition for their generous gifts. McVeigh also said a planned giving committee has been established for their organization as well.

Diane Charette, Director of Marketing with Hospice of the Treasure Coast has indicated that their response has been positive as well and they too have begun planning a committee for these types of donations. She stated that Leave a Legacy has been wonderful about enlightening both staff and board members of Hospice as well as potential donors. During a Leave A Legacy® Speaker’s Bureau presentation to the Hospice board, chair **Jane Rowley**, commented, “This a no-brainer, we need to be doing this as soon as possible!”

Research indicates that 75% of donations are made by people in their lifetimes, but that number dwindles to 6% when gifts are given as planned bequests through a will or estate plan. Leave a Legacy has made an incredible difference this past year in changing that. The many non-profit partners are grateful for Leave a Legacy® bringing the concept of planned giving to them, recognizing the importance of education on this topic, as well as enlightening their potential donors. The Leave A Legacy® Speakers Bureau who present the planned giving message is made up of strategic partners -

businessmen and women who are the professional wealth advisors and counselors donating their time and expertise to this worthy cause.

March was proclaimed “*Leave a Legacy Month*,” recognizing this organization for its dedication in assisting area non-profit charities formulate a planned giving program, for increasing public awareness of and participation in charitable gifts and bequests, and by encouraging individuals to consider continuing their generosity to their favorite charities through their wills or estate plan.

As a project of the National Committee on Planned Giving (NCPG), Leave a Legacy of the Treasure Coast is but one of 154 programs operating throughout the U.S. and Canada that promote the importance of planned gifts to charities. Implemented in local communities by representatives of charitable organizations, financial and estate planning advisors, businesses and media, the local program is sponsored by the **Treasure Coast Planned Giving Council (TCPGC)**, supported by the **Martin County Community Foundation (MCCF)** and other strategic partners in cooperation with the **Treasure Coast Chapter of the Association of Fundraising Professionals (AFP)**.

As a public awareness program, Leave A Legacy ® encourages individuals, couples and families from all walks of life to work with development officers at their favorite charities and trusted estate planning and financial advisors on ways to include charitable bequests or planned gifts in their will or estate plan. Its mission is threefold: Spread the message to potential donors about how to give more effectively; Promote greater public awareness of the personal and community benefits of philanthropic giving; Impact organizations by sharing how to maximize planned giving techniques to reach goals and objectives.

For information visit the web site at www.leavealegacyflorida.org, or call James Campo, Certified Financial Planner, and president of TCPGC at 772-286-0330.

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