

Michelle Strickland  
Marketing Campaign Sample  
Charitable Gift Annuities  
June 2021-June 2022

I developed a campaign for the Planned Giving Department that promoted Charitable Gift Annuities, a giving vehicle used by the Planned Giving team.

The goal was to increase the number of “hot” or “warm” leads from 7 or 8 in a year to 20 to 25. We accomplished that goal with a strategy that included:

A direct mail campaign  
promotion in the quarterly Planned Giving e-newsletter  
a form specific to this project that allowed recipients to request more information  
follow-up emails to recipients who opened the link to the form.

I devised the strategic campaign, developed a timeline, wrote the copy and created the newsletter and emails.

- A. Postcards for June, September, December and March
- B. Planned Giving quarterly newsletter promo
- C. Form to request information
- D. Follow up email
- E. Results from March 2022 Follow-up

**A.**



**Gifts do so much good for KU.**  
**And here's a gift that does even better.**

What's better than a cool summertime treat? Treating yourself and KU with a charitable gift annuity that supports your passion at KU and also provides you with guaranteed income from a secure investment. Charitable gift annuities mean ice cream with sprinkles for everyone!



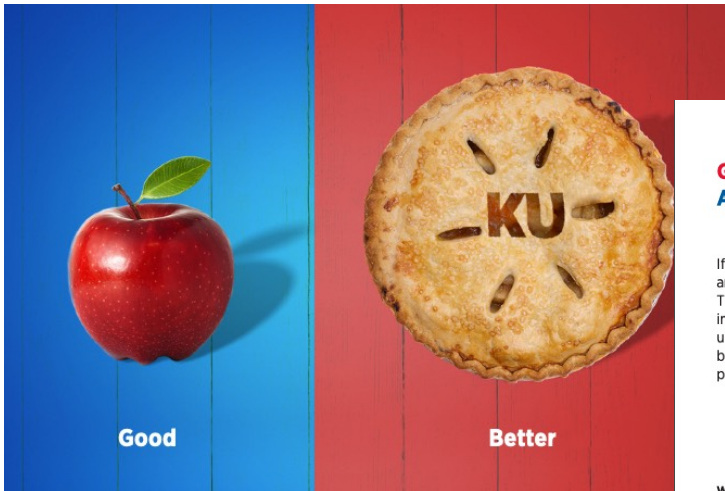
**Want to know more about Charitable Gift Annuities?**

- Visit [kuendowment.org/CGA](http://kuendowment.org/CGA)
- Call 785-832-7327
- Send an email with "CGA Request" in the subject line to [giftplanning@kuendowment.org](mailto:giftplanning@kuendowment.org)
- Scan the QR code on the right



**KU**  
**ENDOWMENT**  
The University of Kansas

P.O. Box 928  
Lawrence, KS 66044-0928



**Gifts do so much good for KU.**  
**And here's a gift that does even better.**

If KU is the apple of your eye, a charitable gift annuity lets you have your pie and eat it, too. This gift provides you with lifetime income and also supports the university. You and KU both get a slice of the pie, year after year!

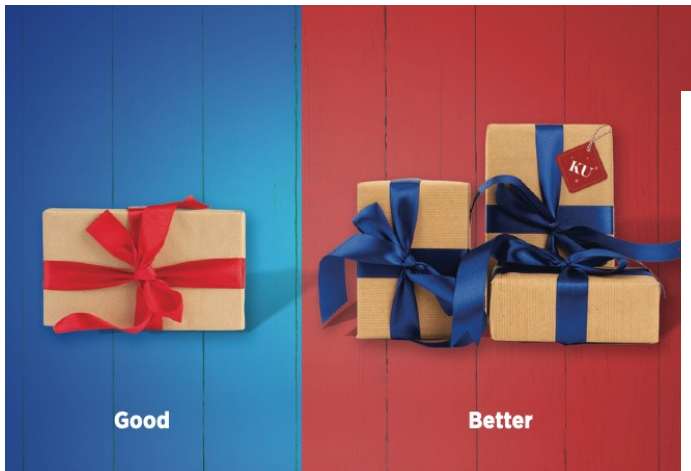


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**Gifts do so much good for KU.**  
**And here's a gift that does even better.**

Giving feels good. And there's no better gift to give than one that gives income back to you, year after year. A Charitable Gift Annuity provides a secure investment and tax benefits for you and supports KU in your areas of choice. Wrap one up today!



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**Gifts do so much good for KU.**  
**And here's a gift that does even better.**

One big victory is worth celebrating, but five National Championships take winning to a whole new level. And everyone wins with a Charitable Gift Annuity, which guarantees income for you and gives a gift to KU to support your area of interest. It's nothing but net for KU and for you!



**Want to know more about Charitable Gift Annuities?**

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B.

View in browser



### Inheriting an IRA

Inheriting an IRA from a parent, sibling, other family member or friend subjects you to a unique set of rules. Read more about guidelines, exceptions and tax implications.

[Read More](#)

### Choosing a Beneficiary for Your IRA



The five common choices for designated beneficiary are the surviving spouse, children, charity, a trust for children or a trust for spouse and children. Which option works best for you? Here are some tips for making that important decision.

[Read More](#)

### IRA Charitable Rollovers Can Benefit KU



An IRA owner who has reached the age of 70½ may transfer up to \$100,000 per year to a qualified charity, such as KU Endowment. It's a simple way to leave a lasting legacy at the University of Kansas.

[Read More](#)

### Gifts that Give Back: Charitable Gift Annuities



Giving feels good. And there's no better gift to give than one that gives income back to you, year after year. A Charitable Gift Annuity provides a secure investment and tax benefits for you and supports KU in your areas of choice. Wrap one up today!

[Read More](#)



### We're Here to Help



**Andy Morrison**  
Vice President, Gift Planning  
(785) 832-7327



**Kristin Shore**  
Development Director, Gift Planning  
(785) 832-7341



**Malcolm Jackson**  
Associate Development Director, Gift Planning  
(785) 832-7383

C.



Gifts do so much good for KU.

And here's a gift that does even better.

One big victory is worth celebrating, but five National Championships take winning to a whole new level. And everyone wins with a Charitable Gift Annuity, which guarantees income for you and gives a gift to KU to support your area of interest.

It's nothing but net for KU and for you!

Fill out the form below to get more information and a customized proposal for you!

SAMPLE RATE CHART \$25,000 Single Life Gift Annuity			
Donor's Age	Annuity Rate	Annual payout	Federal Tax Deduction
65	4.2%	\$1,050	\$8,588.29
70	4.7%	\$1,175	\$9,938.22
75	5.4%	\$1,350	\$11,257.40
80	6.5%	\$1,625	\$12,248.15
85	7.6%	\$1,900	\$13,829.24

Deductions will vary slightly with changes in the IRS discount rate. These examples are for illustration purposes only and are not intended as legal or tax advice. Rates as of June 2021.

## Charitable Gift Annuities

Your info

First Name: \*

Last Name: \*

Primary Email: \*

Email \*

Confirm \*

Phone: \*

Birth Date: \*

Potential Investment: \*

Other Amount (minimum amount of \$10,000):

[Submit»](#)



If you have questions, please contact our Gift Planning department at [giftplanning@kuendowment.org](mailto:giftplanning@kuendowment.org).

Visit [kuendowment.org/planmygift](http://kuendowment.org/planmygift) for more information on charitable gift annuities and other ways to support the University of Kansas.

D.

View in browser



## A gift for KU that gives income to you!

You might be considering a charitable gift annuity to benefit the University of Kansas. It's a great choice, and setting one up is easy. It's a gift that creates a legacy in your area of interest while providing income and tax benefits to you or your designated beneficiary. With charitable gift annuities, everyone feels like a champion!

View a sample payout and [fill out this simple form](#) to find out more.

SAMPLE RATE CHART			
\$25,000 Single Life Gift Annuity			
Donor's Age	Annuity Rate	Annual payout	Federal Tax Deduction
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[Get Your Sample Payout](#)



E.

# Planned Giving Follow-Up March - Charitable Gift Annuities - OpensClicks

[Preview](#)

Total emails sent

1,022

## DELIVERS >

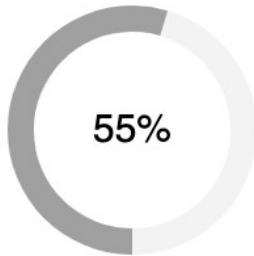
1,022



Delivery Rate

## UNIQUE OPENS >

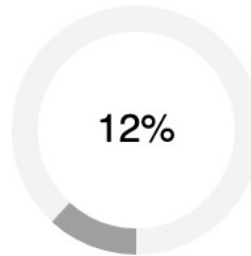
558



Open Rate

## INITIAL CLICKS >

66



Click to Open Rate

## CONVERSIONS >

0



Conversion Rate

## BOUNCES

0 email(s)

0%

## UNOPENS

464 email(s)

45%

## UNSUBSCRIBES

2 email(s)

<1%

## SPAM FLAGGED

1 email(s)

<1%

## COMPARE OPEN RATE TO PEERS >