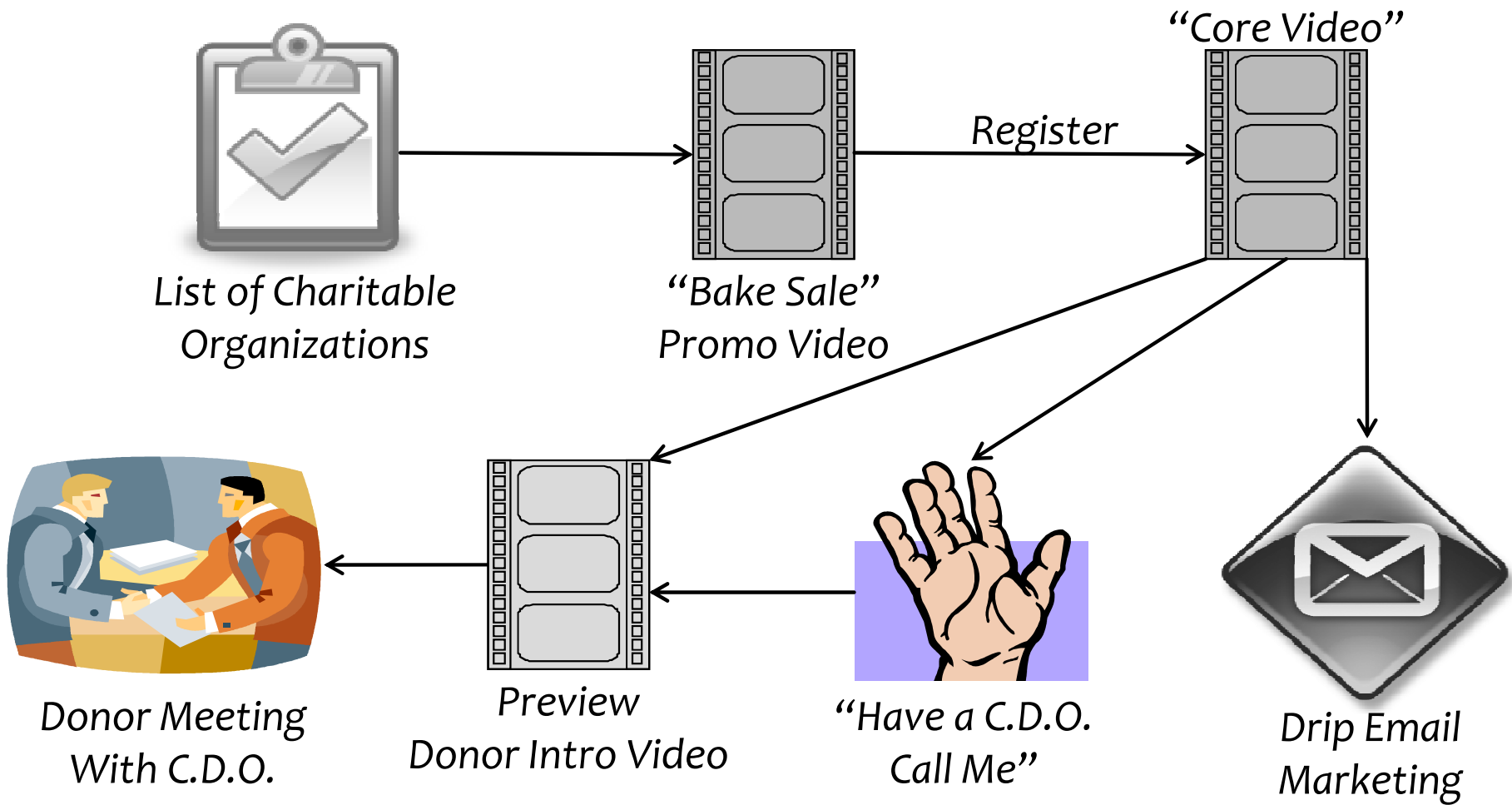


CharitabLiving Plan Training – Session III

Sales & Marketing

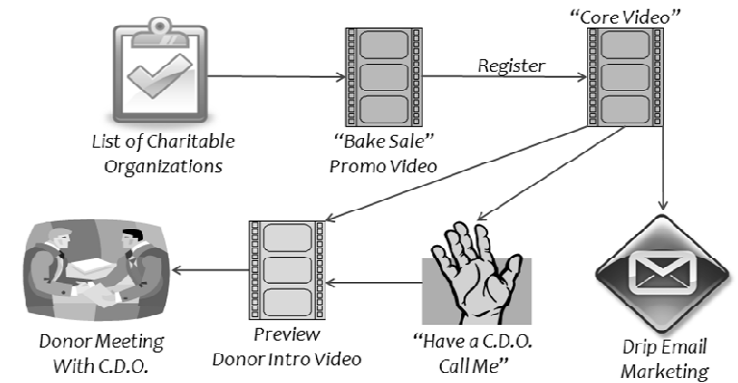
- Goal: Equip you to “hit the street running”
 - “How-To” – Process Review
 - Marketing Strategy
 - Objections







List of Charitable Organizations



- Five areas: Religious, Medical, Humanitarian, Arts, Education
- Titles: Development, Advancement, Executive Director, CFO
- Email Addresses, Phone Numbers



[Search Again](#)

Your Search Results

7149 organizations matched your search criteria.

Your search criteria were -
State: IN
City: indianapolis

Use the Compare button to compare up to four organizations listed on this page.

[Compare up to four organizations from this results page](#)

Compare	Organization name (click on a charity's name to go to its Report)	State, City
<input type="checkbox"/>	100 BLACK MEN OF INDIANAPOLIS INC	Indiana, INDIANAPOLIS
<input type="checkbox"/>	151ST INFANTRY ALUMNI ASSOCIATION	Indiana, INDIANAPOLIS
<input type="checkbox"/>	2005 PROCK FAM C L A T FOR RANDY W PROCK	Indiana, INDIANAPOLIS
<input type="checkbox"/>	2012 COMMUNITY LEGACY INC	Indiana, INDIANAPOLIS
<input type="checkbox"/>	21ST CENTURY CHARTER SCHOOL AT FOUNTAIN SQUARE	Indiana, INDIANAPOLIS
<input type="checkbox"/>	21ST CENTURY CHARTER SCHOOL AT GARY INC	Indiana, INDIANAPOLIS
<input type="checkbox"/>	21ST CENTURY CHARTER SCHOOL INC	Indiana, INDIANAPOLIS
<input type="checkbox"/>	24 GROUP INC	Indiana, INDIANAPOLIS
<input type="checkbox"/>	28TH STREET CHURCH OF GOD IN CHRIST INC	Indiana, INDIANAPOLIS
<input type="checkbox"/>	3682 REALTY CORPORATION	Indiana, INDIANAPOLIS
<input type="checkbox"/>	38TH & FRANKLIN ROAD NEIGHBORHOOD PARK INC	Indiana, INDIANAPOLIS

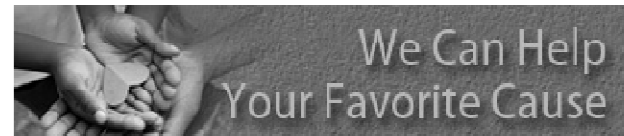
Welcome Guest! | [Sign In](#) | [Create Account](#)
[Update Nonprofit Report](#)
[Analyze Nonprofit Data](#)
[Take Action](#)
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 Nonprofit Search

[Home](#) > **Search Results**

 Your search for **46240** produced 526 results.

Viewing 1 - 25 of 526 results

 Related Keywords: [educational and social activities](#), [chapter organization](#), [park tudor school](#), [educational activities](#), [urban development](#) ... [more >](#)

Remove Criteria:

 Keywords: [46240](#)
 City: [indianapolis](#)
 State: [indiana](#)

 Page 1 [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [10](#) [Next >](#)
Organization Name
Details
Sort Results By

INDIANAPOLIS SAILING FOUNDATION INC
[Read Reviews](#) | [Write a Review](#)

Indianapolis, IN 46240

Category: N70 (Amateur Sports Competitions)

[Finding and Using IRS Subsection Codes](#)


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Arkansas

Natalie Cranford Evans

Regions Covered: Arkansas, Southern Kentucky, and the Western 1/3 of Tennessee

California

David Russo

Regions Covered: Campbell, Silicon Valley and Central Coast

Erin McGlynn

Regions Covered: Alameda, Contra Costa, Marin and San Francisco Counties

Gail Robson, CSPG

Regions Covered: Orange / Riverside Counties, L.A. Coastal Cities and West Side Los Angeles County

Julie Van Dooren, CSPG

Regions Covered: Sacramento, Great Valley, Redwood Empire and Northern California

Kathleen Sweerley, CFP®, CLU, ChFC, CASL®

Regions Covered: California - San Diego and Imperial Counties

Nick Kinney

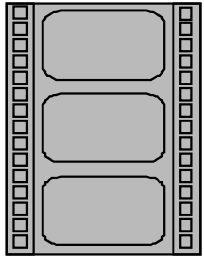
Regions Covered: Fresno, Santa Barbara, the Gold Coast California, Northern and Eastern Los Angeles County, San Bernardino County, and Hawaii

Colorado

John Finegan

***American Cancer
Society Website –***

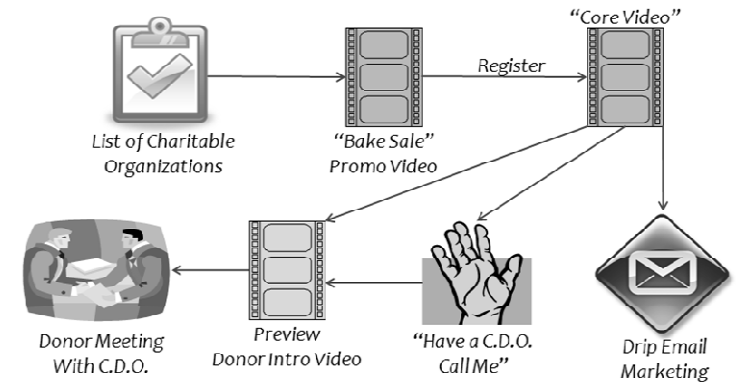
***“Meet our
Giving Team?”***

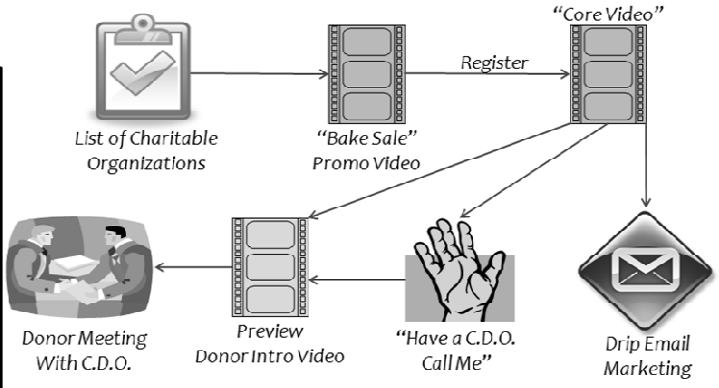
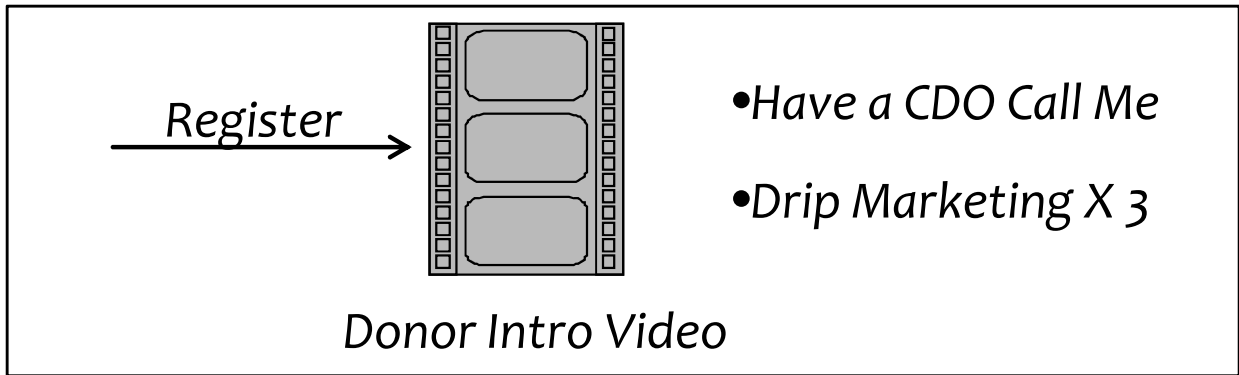
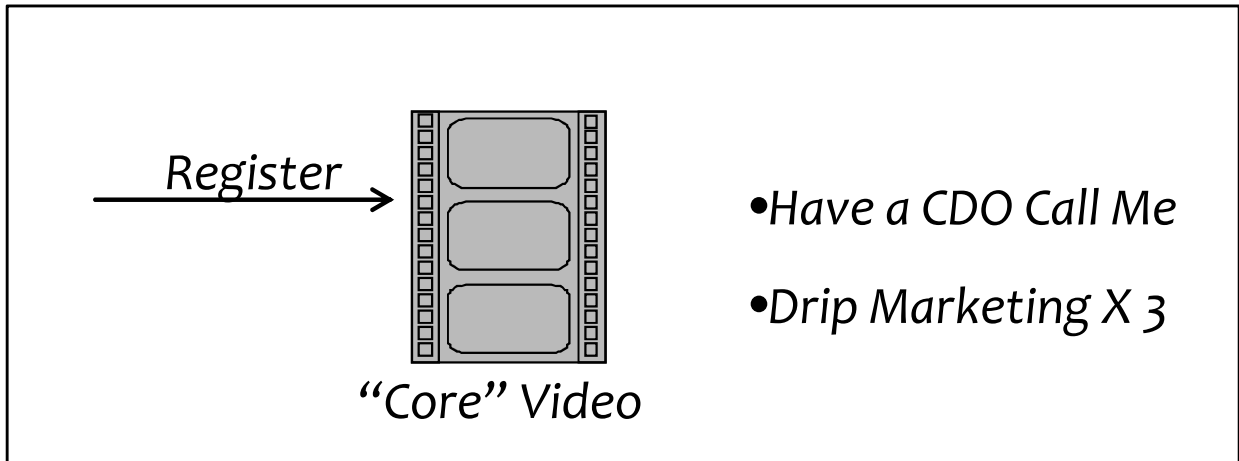


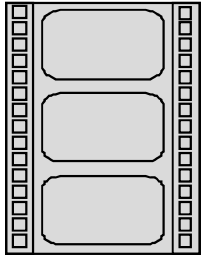
“Bake Sale”
or

“But-Because”
Promo Video

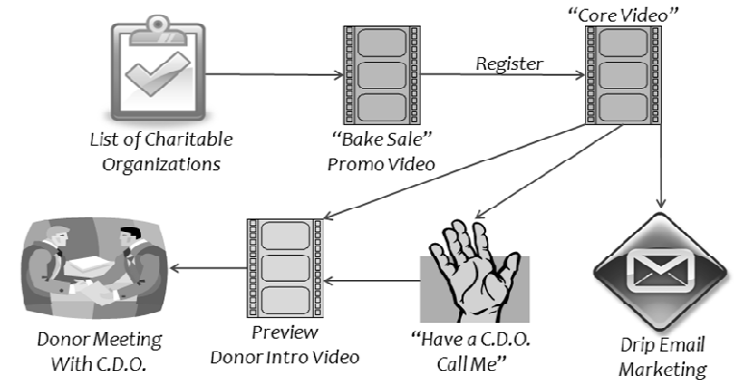
- Complete Certification Testing – Mark Miller will send your links
- Choose one of the promotional videos – “Bake Sale” or “But-Because”
- Embed into email as Hyperlink
- Compose text
- Send
- Call in advance to introduce







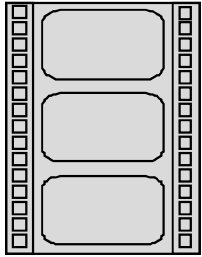
Donor Intro Video



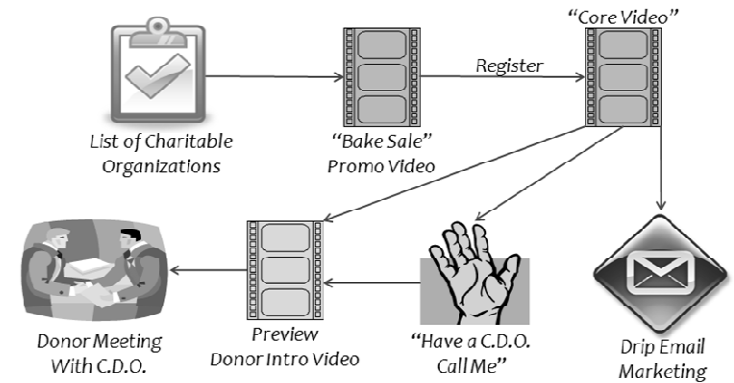
Rollout Strategy

- Donor Intro Video
- Never need/ask for a Donor List
- Encourage Insiders/Testimonials
- Donor Intro Video to Social Media, Web Link, Newsletters, etc.





Donor Intro Video

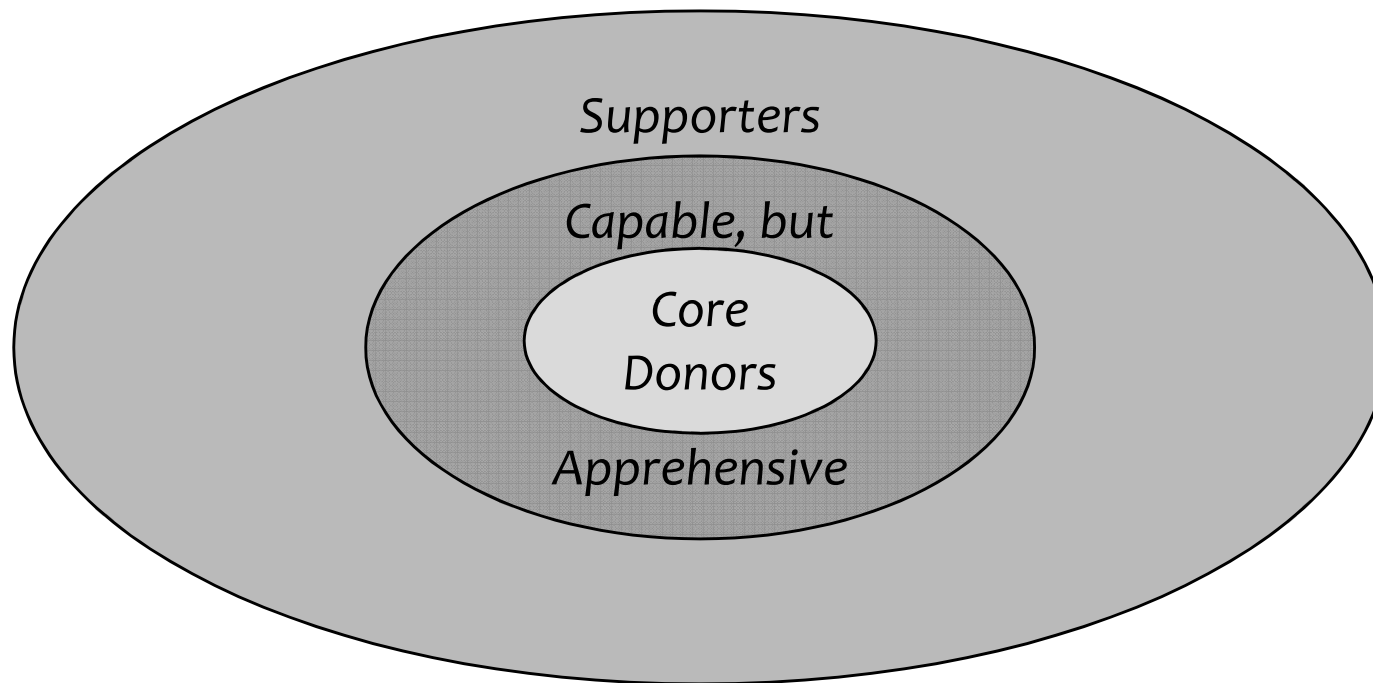


Donor Intro Video “Tag”

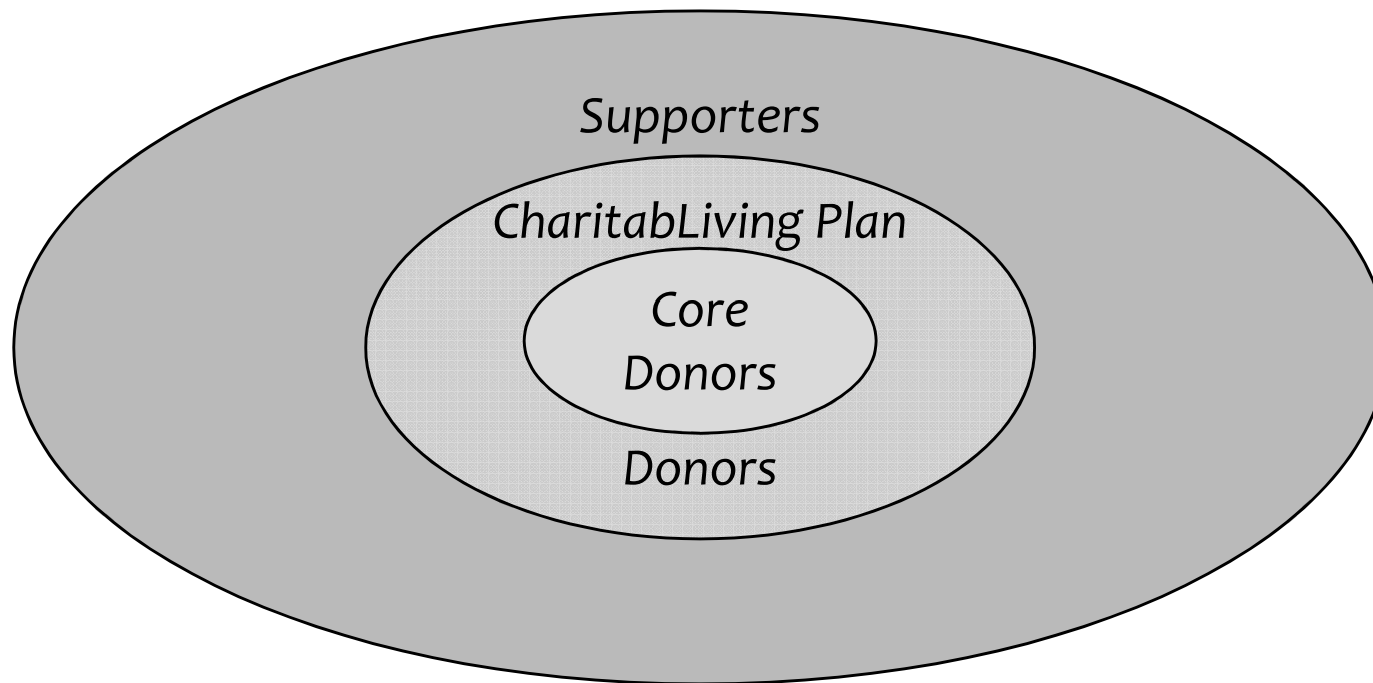
- 20-second video tag that precedes the Donor Intro Video, Specific Landing Page
- We provide Script, Call-in Number, or Computer recording instructions to record message
- They provide photograph of Executive or “Face” of the organization, and Logo
 - “Cost” of the program is the fee for the Donor Intro Video “Tag”
 - \$399 – we charge you \$250
 - Recommend offering to “donate” \$399 back on First Deal
- 1) Skin in the game, 2) Higher Viewership/Call to Action Compliance



Selling Strategics



Selling Strategics



Selling Strategies

- *Unlike any other traditional giving*

Donor Not Forced to Absorb Reduction in Income/Net Worth in order to Give

- *CGA Option creates lifetime income*
- *Guaranteed Refund Design – ensures complete refund of all funding plus Gift*



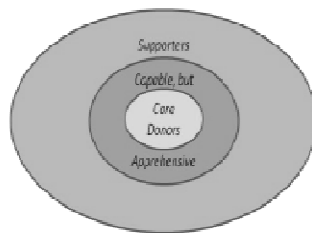
Collateral/Support

- We're here to help
 - Case Design
 - Strategizing
 - Objections
- Multi-Location Donor Coordination
 - Case Studies
- Comparison “Leave Behind”
 - CLP One-Pager
- PowerPoint Presentations



CharitabLiving Plan One-Page Flyer

CharitabLiving Plan



all those "what-ifs" that life can hand out that has them holding fast to their wallets – even when their hearts are telling them something quite different.

Giving Without Giving Up
And that's where the CharitabLiving Plan comes in.

You see, the CharitabLiving Plan offers a different outcome – one where "giving" doesn't mean "giving up."

A CharitabLiving Plan is funded with money the supporter wants to protect, preserve, and grow.

It is designed to create an economic outcome of the supporter's choosing first. That might be income; it might be a complete refund of any money they give you; it might be a combination of both – and even other financial outcomes.

What's In it for YOU?

Best of all – it provides you a substantial, upfront cash gift *at the same time*.

Now we know how that must sound. How can you give money away and have as much or more money after giving so – than you had before?

Give us a call and let us show you how the CharitabLiving Plan works. We might just be able to move the giving needle in your organization.

Donors and Supporters

You have a universe of supporters. They're folks who enthusiastically support the work you do. They cheer you on – read your newsletters – volunteer – and may even give money from time to time.

Among your community of supporters is a group we call "core" donors. These are the folks who provide much of the financial support for the organization. They give consistently and generously.

For them the financial consequences of giving are less important than the calling to give and the emotional satisfaction that comes from giving.

Donors in Waiting

But just outside the "ring" of core donors, are a group of supporters who feel just as called to give – and they have the same need for the satisfaction of giving.

The problem is simple. They may need their money someday – so giving it away now is something they can't reconcile. It's

CHARITY BENEFITS

- Up front cash of 15% - 30% of the Plan Deposit; plus the option of...
- Ongoing gifting, and...
- End-of-Life Gifting
- No stock market risk

SUPPORTER BENEFITS

- Certain design options provide the supporter with guaranteed lifetime income.
- Other design options provide the guarantee of a 100% refund of all deposited funds and all charitable gifts.
- All gifts are tax deductible.
- Fully customizable
- Exciting options for plans set up for children/grandchildren

Fortuna Financial Group, LLC
8426 Woodfield Crossing
Blvd., Suite 100
Indianapolis, IN 46240
317-489-7500
www.charitabliving.com

charitabLIVING

Charitable Living Plan		
This table below compares features of the two primary design options for the Charitable Living Plan, and answers the most commonly asked questions in order to help prospective donors better understand the plan, and begin to determine which design features and structuring alternatives may be most important in personalizing a Charitable Living Plan for their needs.		
Feature/Question	Guaranteed Lifetime Income Contract	Guaranteed Refund Contract
What Product Platform is the Charitable Living Plan built on?	A Charitable Gift Annuity using American Council on Gift Annuities Published Payout Rates and contract guidelines (some plans will use a Single Premium Immediate Annuity to achieve owner's objectives)	Specially Designed Life Insurance contract issued by top insurance company that offers the unique design features to accomplish Plan goals
Will the Plan provide Lifetime Income?	Yes - Guaranteed by the issuing charity or insurance company	Yes - Non-Guaranteed for life (but typically at a higher payout rate)
How Much Income Will I Receive?	Depends on age at which income starts and whether income is payable for one life or two. Average for 70 year old, single-life income will be roughly 5% of gift amount per year	Depends on age at time of income, and prior withdrawals for personal use or charity. A 65 year old whose plan has been funded for 10 years, and who gave 10% of his funding amount to charity will realize income of 5-6% of total funding amount, per year
How frequently can I receive Income?	Monthly, Quarterly, or Annually	Monthly, Quarterly, or Annually
Can Income continue through the life of a spouse?	Yes - income payout rates are reduced slightly for two-life payouts	Yes - income rates either unaffected or increased for two-life payouts
How is Income Taxed?	Partially tax-free during "life expectancy," ordinary income thereafter	Tax-free if funded in installments over at least five years; otherwise tax-deferred with taxable withdrawals
Can Income be guaranteed for a certain period of time unrelated to death?	Yes - in increments of 5 years	Income can be started and stopped, increased or decreased at the Plan Owner's Discretion (income adjustments can impact plan solvency)
Can Income Payout Rates be increased if I'm in poor health?	Yes - at outset of contract only as determined by insurance company	Yes - in the event of a Chronic Illness, terminal illness, or long-term-care need
Do I get an up-front tax deduction?	Yes - IRS calculation will determine tax deduction in year of gift - typically 20-50% of total gift	Yes - Any amounts given to charity at the discretion of the Plan Owner are 100% tax-deductible in the year given
How much will be refunded to my estate?	None	At least 100% of funding amount plus charitable gifts (based on life insurance net death benefit)
Best for Ages?	50+, "Sweet Spot" 70-85	6 mos. - 75 years, "Sweet Spot" 30-50
Minimum Health Requirements?	None	Yes - however plans can be set up on kids/grandkids for uninsurable owner(s)

CLP Design Option Comparison

Can I fund my plan with a Lump-Sum?	Preferred, but not necessary	Yes - but income cannot be tax-free when lump sum funded
Can I fund my plan in Installments?	Yes - but income must be deferred until funding is complete	Preferred (5 years or more) since income can then be tax-free for life. Installment funding will also mean installment giving.
Is there a Minimum Funding Requirement?	Yes - \$10,000 (total of all installments)	Yes - age and funding period dependent. A 30-year old can fund plan with as little as \$200/month.
If I fund my plan in installments, are the installments flexible?	Yes - start/stop - increase/decrease at your discretion	Yes - start/stop - increase/decrease at your discretion, so long as plan balance is adequate to pay internal plan costs
Can I fund my Plan with Qualified Money (IRAs, etc.)	Only after a taxable distribution. However, the tax deduction can offset much of the tax liability	Only after a taxable distribution. However the plan itself can be designed to pay the tax liability.
Are there other Funding Alternatives?	Can be funded with appreciated, non-cash assets (additional capital gains tax deferral possible)	Funded with cash only - or an asset that can be liquidated by the charity so that plan can be funded with cash
Can income start immediately?	Yes - within 30 days	Yes - within 30 days - but better if left untapped for at least 5 years
Can Income be Deferred into the Future?	Yes - and doing so will result in a higher income payout rate	Yes (preferable) and income will be paid out at a higher rate
Will the Money I put into the Plan Grow?	No - it is used to support income payments only	Yes - will grow at a fixed rate, tied to a market index (with complete downside protection) or a blend of both
How much will my Charity receive?	Usually about 50% if deferred until the income obligation is complete; or a discounted amount if taken up front - usually 20-40% of the funding amount	At the discretion of the Plan owner. up to 25% can be gifted up front. Any upfront gift will impact the plan's income potential (smaller up front gift = greater income & vice versa)
Can I take additional withdrawals?	None possible beyond income	Yes - partial or full withdrawals are allowed based on plan balance - tax and refund consequences may apply
Can I change the charity - beneficiary?	Yes - Plan Owner designates the beneficiary(ies) on any residuum	Yes - Plan Owner determines the beneficiary on any/all gift amounts
Can I Split my Gift amount among multiple Charities?	Yes - at your discretion	Yes - at your discretion
Can I cancel the plan altogether and get a refund?	No	Yes. Refund will be based on plan balance at time of cancellation - largely a function of withdrawals and income taken to date
Is there a fee for the Charitable Living Plan?	No	No



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317-469-7590 www.CharitableLiving.org



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Objections

<i>We don't make financial recommendations to our donors</i>	<i>Actually you do – you recommend they give you money – which results in a 100% financial loss to them. The CharitabLiving Plan doesn't impose the same outcome on the donor.</i>
<i>We don't talk about investments with our donors</i>	<i>We don't either. Both designs of the CharitabLiving Plan are contracts – not investments. The distinction is that investments involve risk – contracts involve definitions and guarantees</i>
<i>We don't reveal/share our donor list</i>	<i>We would never ask you to do so. You are 100% in control at all times. Once we've produced the video tag – we give the video to you by way of an internet link – you distribute as you see fit.</i>
<i>You'll need to talk to our Planned Giving folks</i>	<i>That's fine – but the CharitabLiving Plan is not necessarily a planned gift. In fact, in most cases, it is designed to produce an upfront gift of <u>unrestricted cash</u></i>

Objections

<i>We've had a negative experience with life insurance in the past</i>	<i>You won't have any experience with life insurance with the CharitabLiving Plan – because the donor owns and controls the policy 100%</i>
<i>We don't let third parties talk to our donors</i>	<i>No problem. When a donor “raises their hand” in response to our video introduction, we'll just route them back to you instead of me – and I'll stand ready to assist in any way you wish.</i>
<i>There's a reputational risk to us when we “endorse” a third party</i>	<i>Understand. However, we're dealing with some of the oldest, most trusted, most stable financial institutions in the world; all of our CDO's are trained and certified, and my professional standards....</i>
<i>You'll need to talk to our Planned Giving folks</i>	<i>That's fine – but the CharitabLiving Plan is not necessarily a planned gift. In fact, in most cases, it is designed to produce an upfront gift of <u>unrestricted cash</u></i>

Objections

<i>How do we know the donor will give to us</i>	<i>You don't – and neither do we. When the donor owns the CharitabLiving Plan personally they make the decision to give or not give – and how much. 99% do – because you introduced them to us.</i>
<i>How long has this Plan been out there?</i>	<i>Charitable Gift Annuities have been around since the early 1900's; and the Guaranteed Refund Design (IUL) is a new application of a life insurance strategy that has been used in the executive comp realm for years. So both versions are proven – but the Charity application is new.</i>
<i>Do you have references?</i>	<i>At present – we don't have permission from any charities to use them as references. The program is relatively new – and we've had good localized success with it – but you'll have a chance to offer this before it becomes a competitive issue whend everybody's offering it.</i>
<i>We already offer a CGA – yours would compete.</i>	<i>We don't have to offer the CGA program – but we find that many organizations would prefer to outsource all the cost and risk of their CGA program to us – by offering our plan – which can look just like yours. Additionally, some organizations prefer our Plan because of it's ability to generate an upfront gift rather than a back-end residuum.</i>

Objections

<i>I don't know if we have people who would qualify for this</i>	<i>You won't until you introduce it and see who responds.</i>
<i>Will this compete with what we're doing now to raise money</i>	<i>Absolutely not. We highly recommend you don't change or discontinue anything that's working for you now. This is just another giving option – another arrow in your quiver – but one with a completely new appeal.</i>
<i>Most of our donations come from smaller contributors</i>	<i>It's a lot easier to solicit small donations rather than large ones – but if you've never asked – you might be surprised – particularly when giving doesn't mean giving up.</i>
<i>We're uncomfortable with the idea of Trust Counselor's Network</i>	<i>TCN only comes into play when we're talking about the CGA version of the CharitabLiving Plan. We can either exclude that design; or “re-insure” CGA plans to shift the risk to a large Insurance company</i>

Objections

<i>How do you make your money?</i>	<i>We're paid by insurance company in the case of the guaranteed refund design, and by Trust Counselor's Network in the case of the Guaranteed Lifetime Income Design. Either way, the plan costs you or your donor nothing other than the \$399 video tag production fee.</i>
<i>Can you send us something we can evaluate?</i>	<i>I have some material I'll leave with you after we meet – but we introduce the CharitabLiving Plan in person only. I know your time is valuable, and you'll know within 10 minutes whether this is worth exploring or not.</i>
<i>Most of our supporters are older</i>	<i>That's great. The Guaranteed Lifetime Income design becomes more attractive the older the donor/supporter</i>
<i>Most of our supporters are younger</i>	<i>That's great. The Guaranteed Refund Design becomes more attractive the younger the donor/supporter</i>