

A DECADE OF MILLION  
DOLLAR BEQUESTS  
**2000-2011**

**WHO GOT 'EM?**  
HOW MUCH DID THEY GET?

**ARE YOU  
MISSING OUT?**

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# 7% OF ALL MILLION DOLLAR GIFTS WERE BEQUESTS

7%

ONLY 1,264 BEQUESTS OVER \$1 MILLION  
WERE RECEIVED BETWEEN 2000-2011.

THOSE BEQUESTS TOTALED  
\$39 BILLION.

\$39  
BILLION



Source:

A Decade of Million-Dollar Gifts: A closer look at major gifts by type of recipient organization, 2000-2011 (April 2013). See [www.milliondollarlist.org](http://www.milliondollarlist.org) managed by the Indiana University Lilly Family School of Philanthropy (School)

# PEOPLE GIVE WHERE THEY LIVE

75%

80%

For instance, for higher education institutions, 61% of the number and **75% of the dollar value** of charitable bequests remained in the **same state**.

And, 75% of the number and **80% of the dollar value** of charitable bequests remained in the **same geographic region**.

COMPARED WITH OTHER TYPES  
OF MILLION DOLLAR DONATIONS,  
**CHARITABLE BEQUESTS OF  
\$1 MILLION+ WERE MORE  
LIKELY TO GO TO LOCAL  
NONPROFIT ORGANIZATIONS.**

**\$1,000,000+**

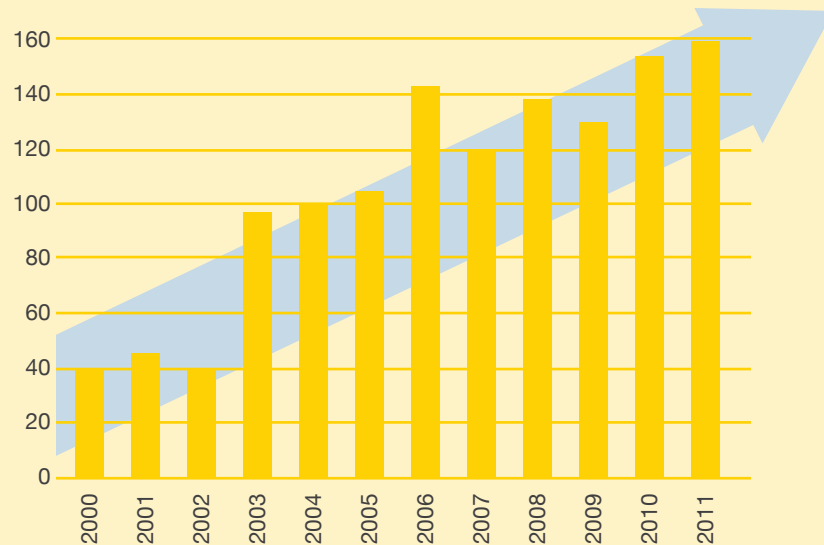


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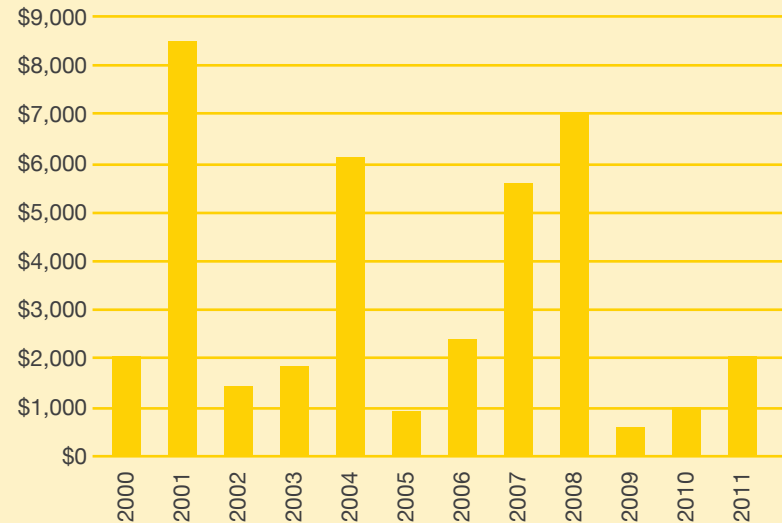
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# A DECADE OF MILLION DOLLAR BEQUESTS 2000-2011

## TOTAL NUMBER OF BEQUESTS



## TOTAL DOLLAR AMOUNT (\$ MILLIONS)



When contrasted with other types of gifts, individual bequests experienced less volatility over time, and **realized a modest increase** over the second half of the period studied (with the exception of corporate gifts).

**BY MARKETING BEQUESTS,  
ORGANIZATIONS EXPERIENCE  
MORE STABLE AND  
RELIABLE INCOME.**



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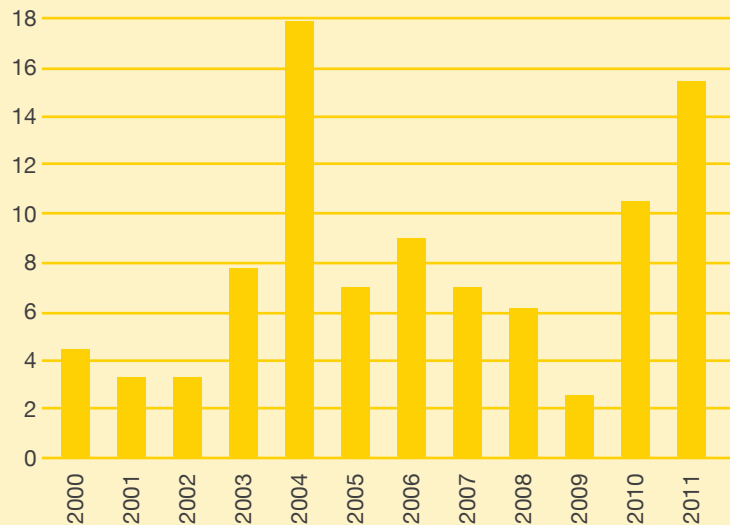
# SEE HOW MILLION DOLLAR BEQUESTS IN THE LAST DECADE WERE DISTRIBUTED ACROSS THE FOLLOWING CATEGORIES OF NONPROFITS:

- Arts, culture, and humanities
- Education (excluding post-secondary education)
- Environment
- Foundations (including corporate, independent, and operating foundations)
- Government
- Health
- Higher education (including colleges and universities, as well as their associated nonprofits, such as hospitals and research centers)
- Human services
- Public-society benefit (including community foundations, and organizations that focus on community improvement or benefit society in large)
- Religion

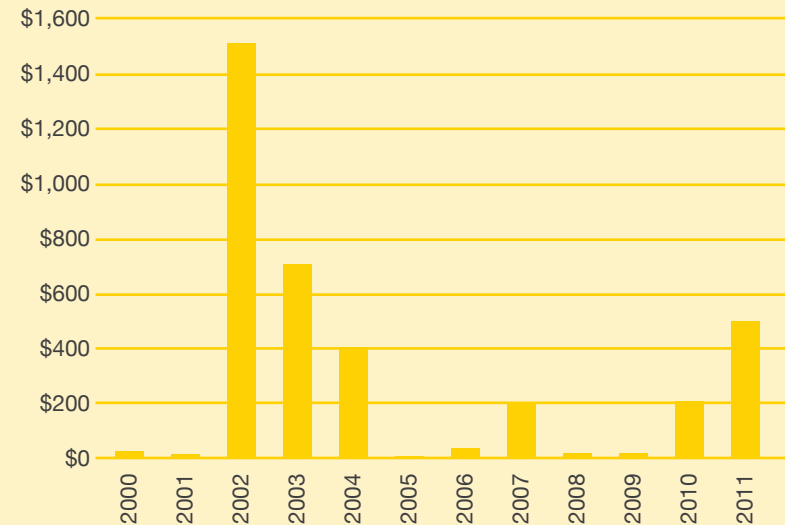


# A DECADE OF MILLION DOLLAR BEQUESTS ARTS, CULTURE, AND HUMANITIES

**ARTS, CULTURE, HUMANITIES  
ORGANIZATIONS  
NUMBER OF BEQUESTS**



**ARTS, CULTURE, HUMANITIES  
ORGANIZATIONS  
TOTAL DOLLAR AMOUNT (\$ MILLIONS)**



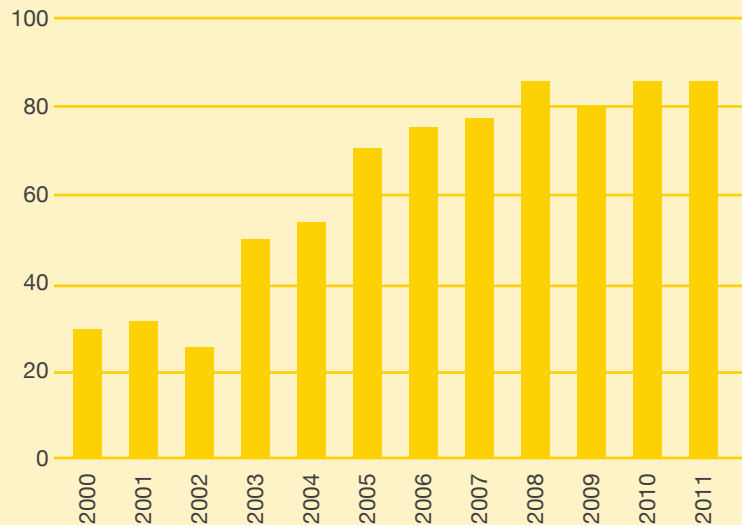
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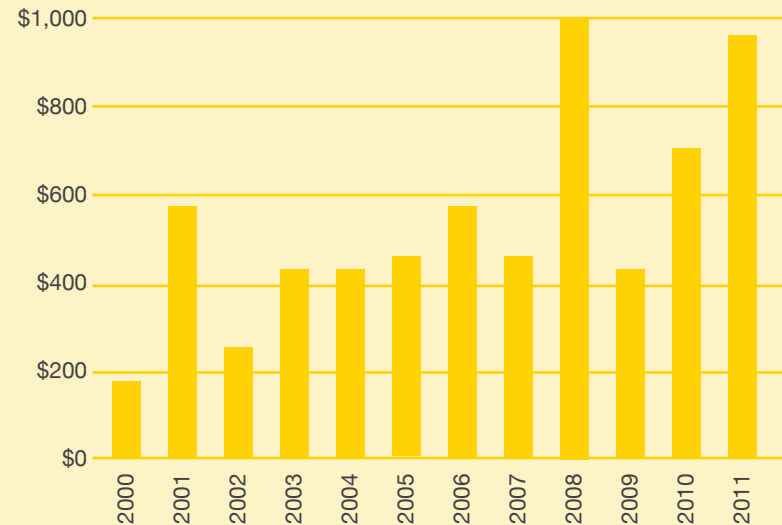
# A DECADE OF MILLION DOLLAR BEQUESTS

## HIGHER EDUCATION

**HIGHER EDUCATION  
NUMBER OF BEQUESTS**



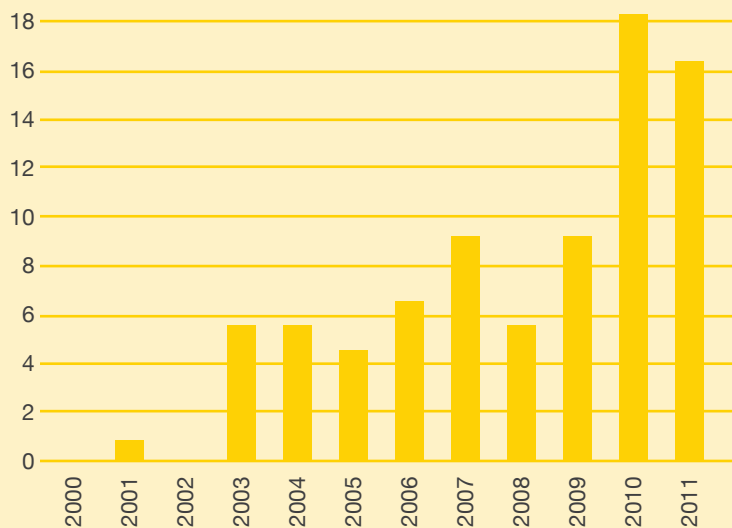
**HIGHER EDUCATION  
TOTAL DOLLAR AMOUNT  
(\$ MILLIONS)**



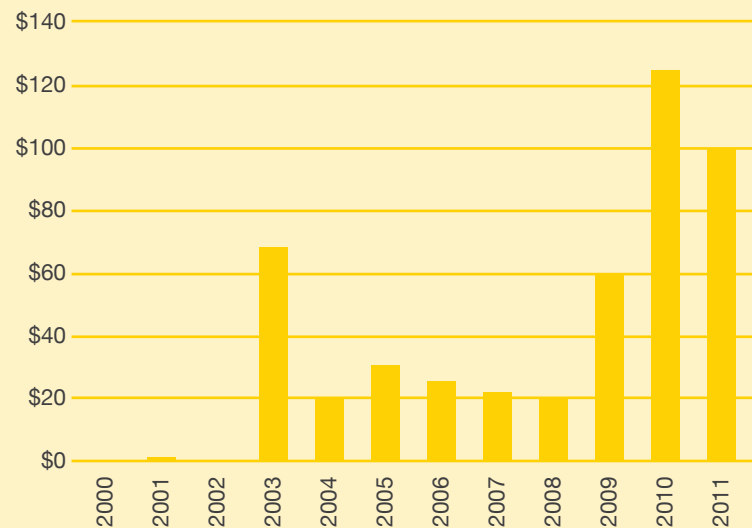
# A DECADE OF MILLION DOLLAR BEQUESTS

## OTHER EDUCATIONAL INSTITUTIONS

**OTHER EDUCATIONAL INSTITUTIONS  
NUMBER OF BEQUESTS**



**OTHER EDUCATIONAL INSTITUTIONS  
TOTAL DOLLAR AMOUNT (\$ MILLIONS)**



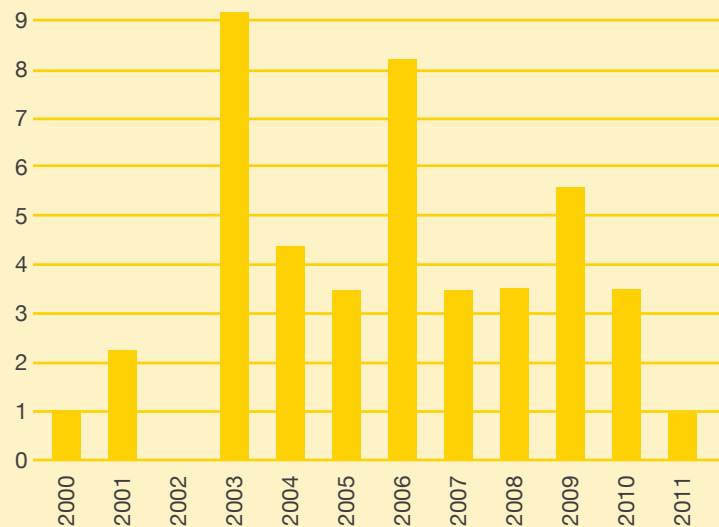
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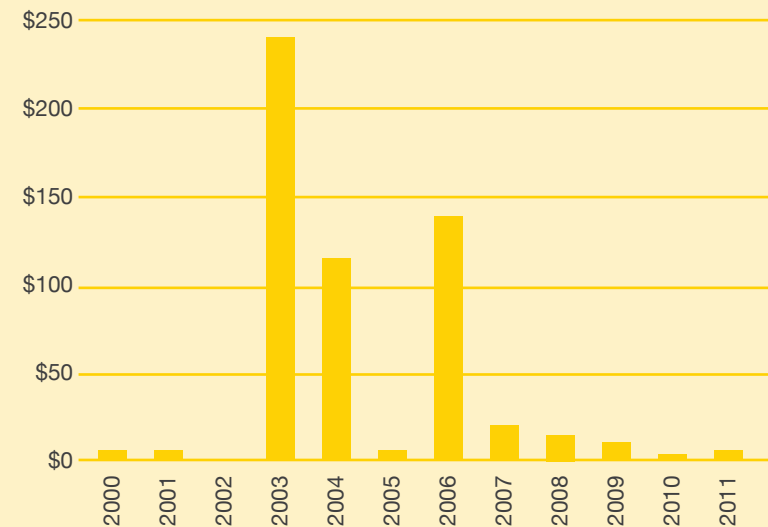
# A DECADE OF MILLION DOLLAR BEQUESTS

## ENVIRONMENTAL ORGANIZATIONS

**ENVIRONMENTAL ORGANIZATIONS  
NUMBER OF BEQUESTS**

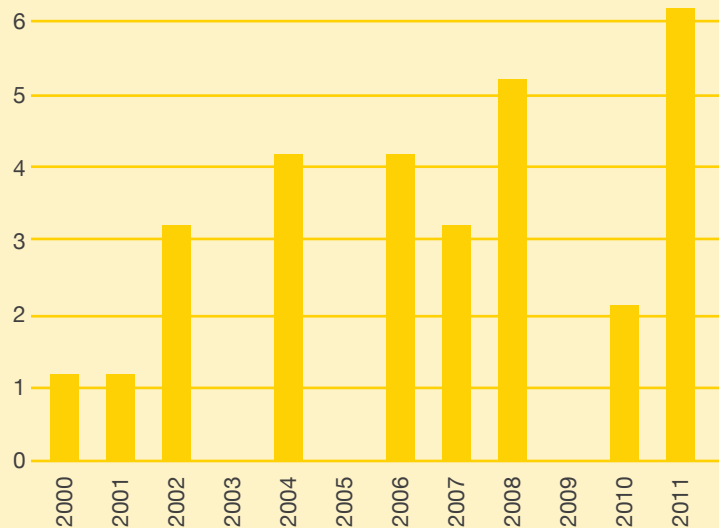


**ENVIRONMENTAL ORGANIZATIONS  
TOTAL DOLLAR AMOUNT  
(\$ MILLIONS)**

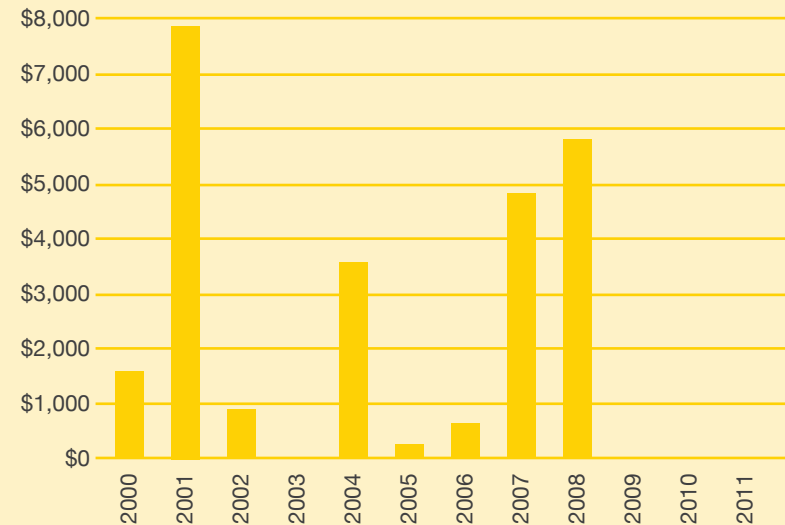


# A DECADE OF MILLION DOLLAR BEQUESTS FOUNDATIONS

**FOUNDATIONS  
NUMBER OF BEQUESTS**



**FOUNDATIONS  
TOTAL DOLLAR AMOUNT  
(\$ MILLIONS)**



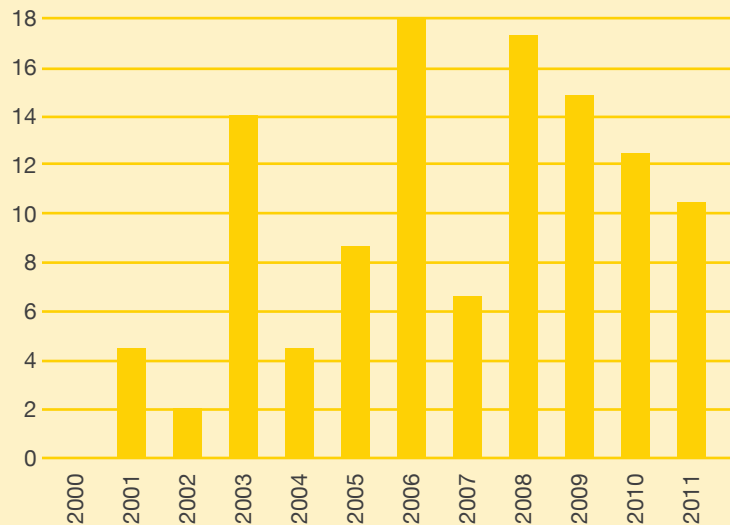
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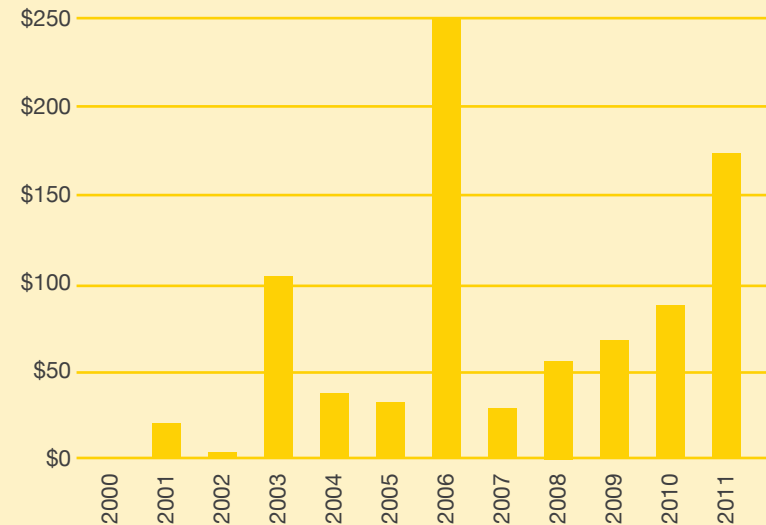
# A DECADE OF MILLION DOLLAR BEQUESTS

## HEALTH ORGANIZATIONS

**HEALTH ORGANIZATIONS  
NUMBER OF BEQUESTS**



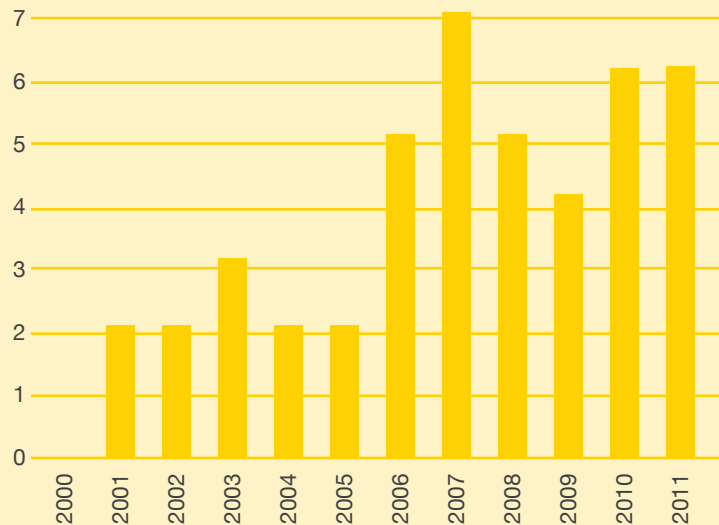
**HEALTH ORGANIZATIONS  
TOTAL VALUE OF BEQUESTS  
(\$ MILLIONS)**



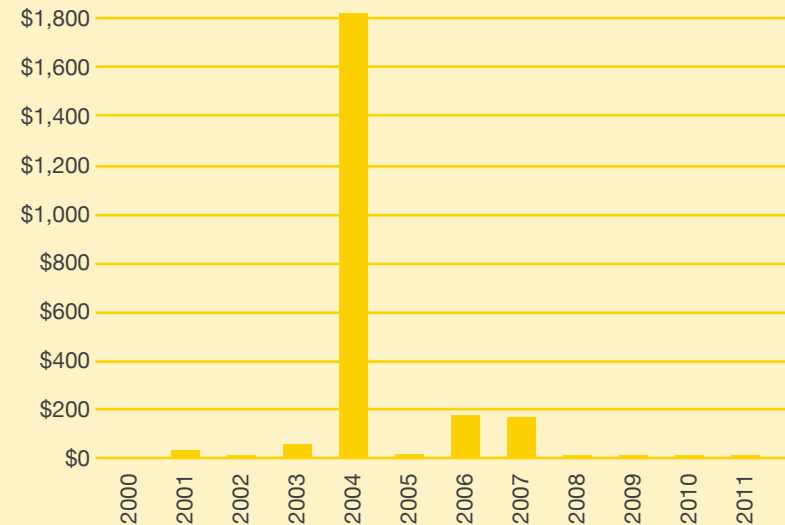
# A DECADE OF MILLION DOLLAR BEQUESTS

## HUMAN SERVICES

### HUMAN SERVICES NUMBER OF BEQUESTS



### HUMAN SERVICES TOTAL DOLLAR AMOUNT (\$ MILLIONS)



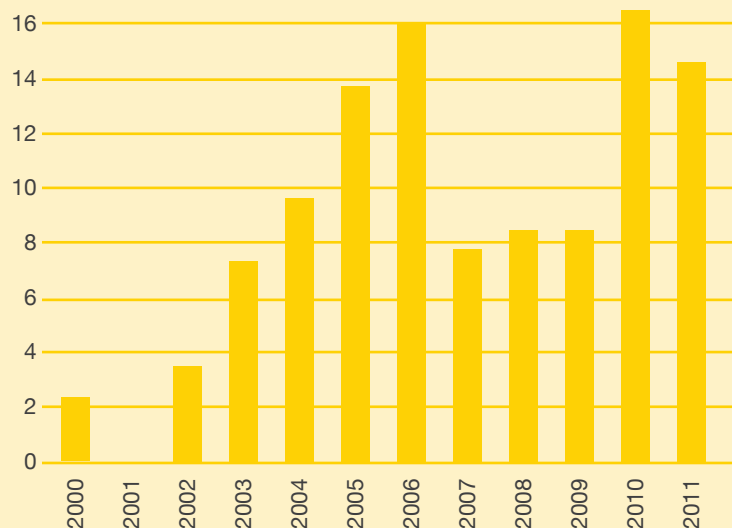
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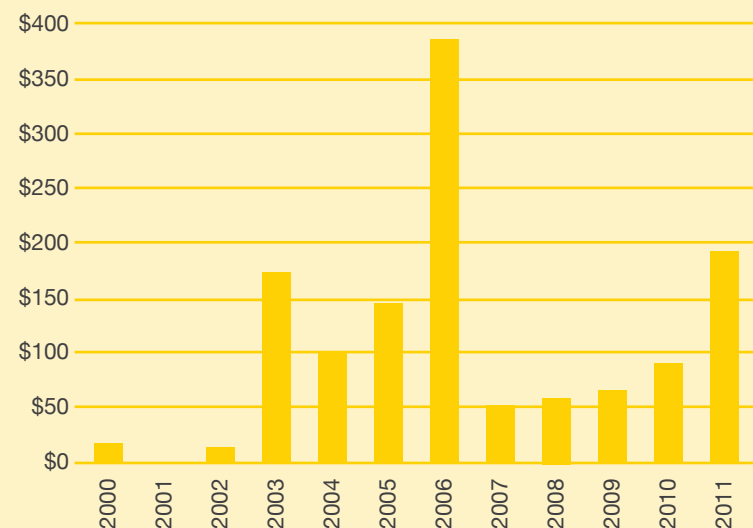
# A DECADE OF MILLION DOLLAR BEQUESTS

## PUBLIC SOCIETY BENEFIT ORGANIZATIONS

**PUBLIC-SOCIETY BENEFIT ORGANIZATIONS  
NUMBER OF BEQUESTS**



**PUBLIC-SOCIETY BENEFIT ORGANIZATIONS / TOTAL DOLLAR AMOUNT (\$ MILLIONS)**

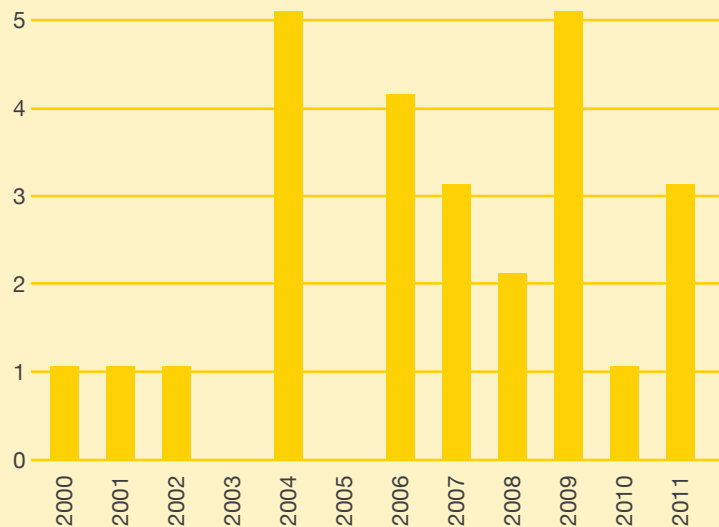




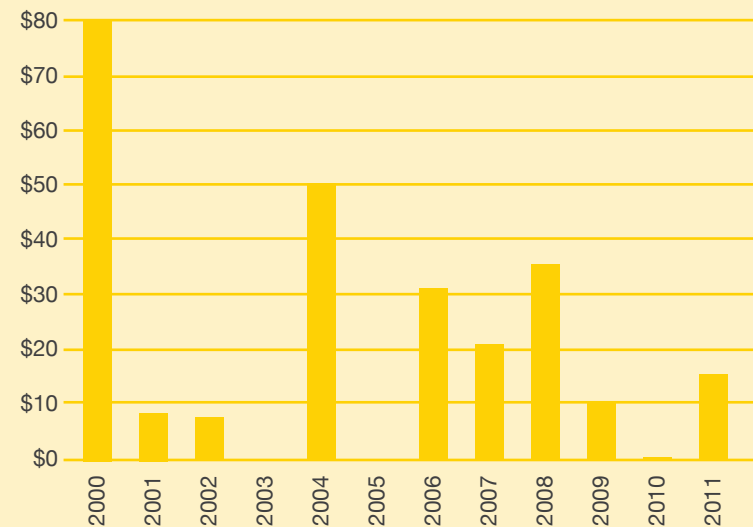
# A DECADE OF MILLION DOLLAR BEQUESTS

## RELIGIOUS ORGANIZATIONS

### RELIGIOUS ORGANIZATIONS NUMBER OF BEQUESTS



### RELIGIOUS ORGANIZATIONS TOTAL VALUE OF BEQUESTS (\$ MILLIONS)

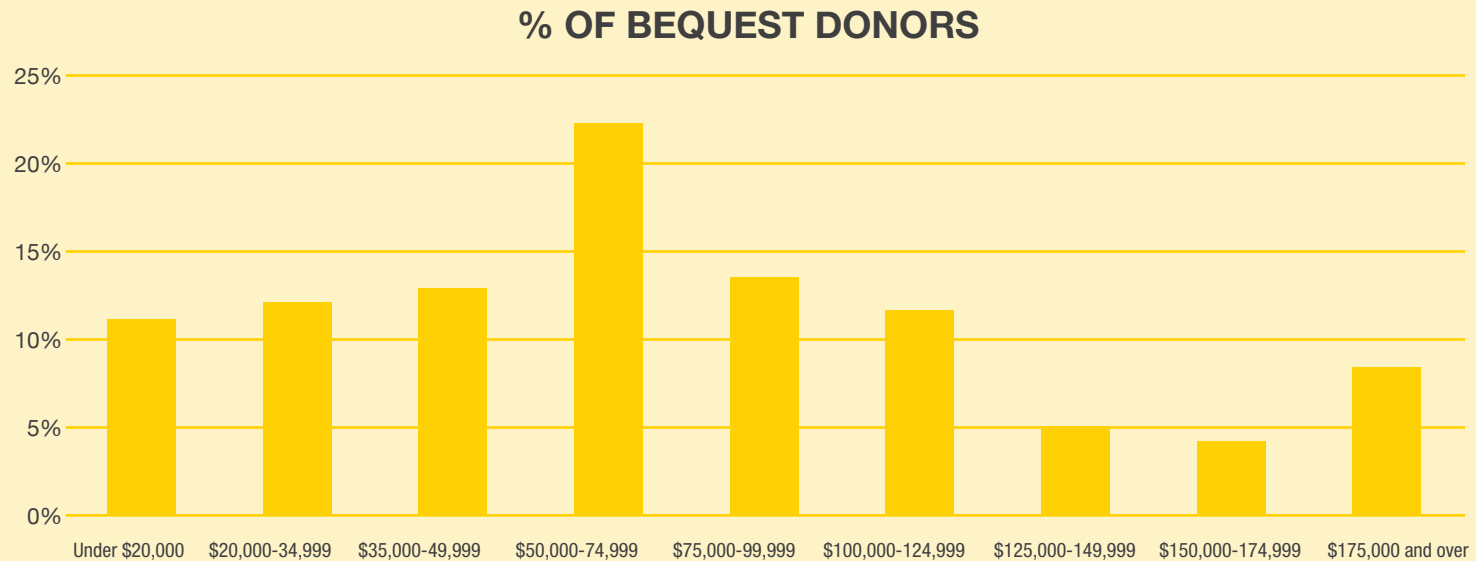


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# DON'T FORGET, MOST BEQUEST DONORS ARE **NOT WEALTHY**

THEY ARE FOUND AMONG ALL INCOME CATEGORIES



Bequest Donors **Median** Income \$60,400  
Bequest Donors **Mean** Income \$75,900

# DOING IT RIGHT

A 15 YEAR STUDY OF RECORDS AT A LARGE NATIONAL NONPROFIT WITH A MAILING PROGRAM DATABASE OF 1 MILLION+ CONCLUDED THAT:

- 1** Donors who received a letter directly asking them for a bequest were **17 times more likely to give a bequest than donors who were not asked.**
- 2** Donors who were asked and thanked **gave twice as much as those who were not thanked.**
- 3** Donors who were cultivated (notes, letters, visits, etc.) after the thank-you **gave 3 to 4 times as much.**
- 4** **Fewer than 1 donor in 14 had informed the charity** that they had been named as a beneficiary in their will.

# smart**giftmaker** solutions

## STRATEGY + CREATIVE + TECHNOLOGY = RESULTS

We're a donor-centric strategic marketing firm with digital innovation at our core. We understand that 80% of an organization's revenue comes from less than 20% of its donors or clients, so we fish where the big fish are. Our unique, trail-blazing technologies and marketing services help you raise more money from the crucial 20%, efficiently—delivering unparalleled results. Get more major gifts for today and more planned gifts for tomorrow.

### legacy**giftmaker**

Generate more leads, cultivate more donors and find more legacy gifts. Individual tracking reports show who is interested in your organization and why, so you can engage and build effective relationships with potential donors.

### legacy**giftmaker+**

Take the guesswork out of marketing by using proven technology to rank, score, and automatically nurture leads with relevant, timely, personalized messages. You'll maximize your gift disclosures by spending your time with the most qualified and interested donor prospects, and letting Legacy Giftmaker+ take care of the rest.

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Find passionate donors in real time, and close more major gifts – faster. Major Giftmaker gives you a 360° view of individual donors' interests, demographics, and preferences.

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Donors want to give where they live. With Giftmaker Connect, you can tap into the power of smarter fundraising by connecting the disconnected and empowering your chapters or affiliates.



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