

We sincerely thank our Partners for their generosity and participation in the 2008 LEAVE A LEGACY campaign.

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#### **Generous Gifts in Kind**

Plante Moran Trust  
Barris, Sott, Denn & Driker, PLLC



# 2008 Report to Partners



For additional information on LEAVE A LEGACY Southeast Michigan, please visit our website at [www.leavealegacysoutheastmichigan.org](http://www.leavealegacysoutheastmichigan.org) or call us toll-free at 1.888.826.7900.

## A Message From Our Executive Director

On behalf of the Co-chairs and the Steering Committee, we are pleased to provide the 2008 report for the 11th annual LEAVE A LEGACY campaign. During the past year, we continued to be generously supported by many individuals and organizations representing area nonprofits, businesses, and financial and legal professionals. We sponsored educational programs and multimedia advertising to promote and encourage legacy gifts in southeast Michigan.

Through our efforts, LEAVE A LEGACY received two public acknowledgments. The first is the Governor's proclamation designating May 2008 as LEAVE A LEGACY month.

*"I encourage all citizens to recognize the value of leaving a legacy through wills as vital support of nonprofit and philanthropic organizations in the very important work they do."*

Jennifer M. Granholm, Governor

In addition, the Planned Giving Roundtable of Southeast Michigan received a special tribute from the State of Michigan for the sponsorship of the LEAVE A LEGACY campaign:

*"We recognize the Planned Giving Roundtable for its sponsorship of the LEAVE A LEGACY program to make Michigan a better place. May the Roundtable know of our admiration, gratitude, and best wishes for continued success."*

Michael D. Bishop, Senate Majority Leader

Andy Dillon, Speaker of the House

John P. Stakoe, 44th District — State Representative

Jennifer M. Granholm, Governor  
Dated May 15, 2008

I would like to thank our Co-chairs, John Bell, Robert Kass, and Jo Rahaim. Through their volunteer leadership and active involvement we continued to fulfill our mission of raising awareness and encouraging legacy gifts. I would also like to acknowledge two County Representatives, Sue Weiss (Genesee) and Laura Schultz (Monroe), who are stepping down this year — thank you for your time, dedication, and service.

Please take a moment to read about the many activities and accomplishments made possible through funding by our partners in charitable organizations and the planned giving community. With your continued support and participation, we can "Make a Difference in the Lives that Follow."

We hope you'll join us as we look forward to an even more successful 2009 campaign!

Lori B. Angel  
Executive Director

The following is an update on our many accomplishments this year:

### Educational Programs

1. Development Day was held on May 15th at The Fairlane Club in Dearborn, sponsored by Bernstein Global Wealth Management and Comerica Charitable Services Group. LEAVE A LEGACY 2008 Partners and members of the Association of Fundraising Professionals — Greater Detroit Chapter were invited to a day-long program offering both basic and advanced educational topics presented by national and local planned giving experts. Over 130 individuals (a new record) attended this year, representing southeast Michigan charities, community foundations, and various professionals (attorneys, CPAs, and financial planners) from the planned giving community.
2. In February 2008, we collaborated with the Financial and Estate Planning Council of Metropolitan Detroit to co-sponsor "Art and Life: Creating A Masterpiece in Southeast Michigan" at the Detroit Institute of Arts.
3. In October 2007, the Monroe County Subcommittee held a professional development workshop which was attended by more than 100 people. The featured speaker was Russell McNamer, JD, a fund development expert from the Boy Scouts.
4. On September 26, 2007, the Washtenaw County Subcommittee held a seminar on "Planned Giving Basics" which was attended by more than 25 people from area nonprofits.

### Community Outreach

The following individuals served as County Representatives:

- Genesee — N. Sue Weiss, Kettering University
- Lapeer — Lori B. Angel, PGRTESEM
- Livingston — Christopher L. Belcher, Comerica
- Macomb — Open

- Monroe — Laura Schultz, American Red Cross
- Oakland — James A. Boucher, Vestevich, Mallender, Dubois & Dristas, P.C.
- St. Clair — Matthew M. Wallace, Matthew M. Wallace, P.C.
- Washtenaw — Donna J. Snyder, University of Michigan and Doug Gross, Raymond James
- Wayne — John C. Prost

Our Speakers Bureau has trained more than 20 highly qualified speakers — who are available to give a presentation to your civic or religious group, board of directors, staff, clients, and donors. Please contact our office at 888-826-7900 to arrange a speaker at your next meeting or event. Presentations were made to the following organizations this year:

- Rotary Clubs — Detroit, Dexter, Saline, and Allen Park
- Catholic Social Services — Washtenaw
- University of Michigan — Masters' Level Fundraising Class
- Monroe County made presentations to many area service clubs and organizations

Members of our Speakers Bureau have also been featured on the following local radio and television programs:

- Comcast Newsmakers, Southfield Cable — April 2008
- It's Your Community, 96.3 WDVD & 93.1 Doug FM — April 2008
- John Prost Show, Grosse Pointe Cable, April, 2008
- Newsmakers, ABC-12, Flint, May 2008
- Community Connection, SW Oakland Cable, May 2008
- Monroe Alive, Monroe Cable, May 2008
- Up Down Around Town, Wyandotte Cable, May 2008

Our public relations firm, Tanner Friedman, is helping us to maximize our visibility in the local media by assisting with partner press releases and placing donor story articles. This year we featured a donor story on Lisa Gandelot, a local Grosse Pointe resident and a campaign partner. Lisa's story was featured on Grosse Pointe Cable, and in both the *Detroit Free Press* (April 2008) and the *Grosse Pointe Times* in May 2008.

Letters to the editor informing the public about the importance of legacy gifts were also submitted by various county representatives and community partners in Lapeer, St. Clair, Monroe and Oakland counties.

Donor stories are the most effective tool in educating the public about legacy giving. To have your donor story highlighted — please contact us today!

Monroe County Subcommittee placed ads in their local quarterly *Senior Living* insert and the *Koffee News* weekly newspaper and created their own video highlighting local donors and their legacy stories.

Genesee County Subcommittee sent a mailing to over 90 Genesee county CPAs informing them about legacy giving and the Governor's proclamation of May as LEAVE A LEGACY month in Michigan.

### Partner Resources — National and Local

LEAVE A LEGACY is part of a nationwide organization spreading the planned giving message. As a part of this national campaign, we are provided with various public relations materials — posters, billboards, PSAs, etc., to help spread the same LEAVE A LEGACY message throughout the United States.



- CDs containing the above-mentioned materials were made available to our 2008 Partners
- 25 of our Partners have been licensed to use the trademarked logo and/or tagline "Make a Difference in the Lives that Follow." Many use it within their email signatures and in newsletters, brochures, and annual reports.

A national public service announcement has been created. (See our website for a link to view the PSA.) This PSA was included on the fall 2007 DVD release of the movie "The Ultimate Gift."

Michigan — recognition of LEAVE A LEGACY month each May.

We invite you to visit our local website:

[www.leavealegacysoutheastmichigan.org](http://www.leavealegacysoutheastmichigan.org)

for more information on our campaign. Our website also has resource information — including a Professional Advisor Directory, a Trust Department Directory, and a listing of our current and cumulative contributing partners. This website is a valuable resource to members of the planned giving community and the general public.

LEAVE A LEGACY is a program of the Planned Giving Roundtable of Southeast Michigan. Under the Roundtable's leadership, the program raised over \$33,000 this year for our public awareness campaign. Our primary expenses were for staff and Development Day. The Planned Giving Roundtable is an affiliate of the National Committee on Planned Giving.

Charitable giving through bequest provides each of us the opportunity to support and perpetuate for future generations those values and ideals most important to us and our families during our lifetimes.

On behalf of the Steering Committee, nonprofits, and all planned giving professionals in Southeast Michigan who have joined us in this effort, we thank you for your continued support.

**John S. Bell**  
Hospice of Michigan  
Co-chair

**Robert E. Kass**  
Barris, Sott, Denn & Driker, PLLC  
Co-chair

**Jo Ellen Rahaim**  
Evangelical Homes of Michigan  
Co-chair

### 2007/2008 Steering Committee

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