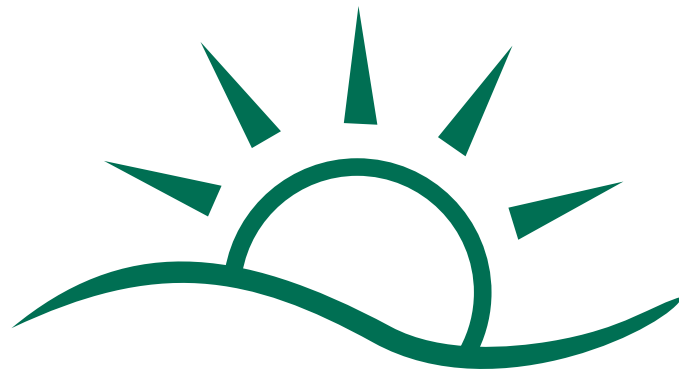




# 2011 **Report to Partners**



**LEAVE A LEGACY<sup>®</sup>**

SOUTHEAST MICHIGAN

## A Message From Our Executive Director

In 2011, LEAVE A LEGACY Southeast Michigan completed our 14th campaign with a 10% increase in partnerships — a strong indicator that our campaign is benefitting both nonprofits and advisors throughout the planned giving community. By pooling resources, we have a greater impact on Michigan residents with the message to “Make a Difference in the Lives That Follow.” I am pleased to provide the Annual Report which highlights the many activities and accomplishments of the campaign.

We obtained statewide acknowledgement from Governor Rick Snyder who issued a proclamation designating May 2011 as LEAVE A LEGACY month in Michigan.

Our annual Development Day conference, co-sponsored with the Association of Fundraising Professionals — Greater Detroit Chapter, was a resounding success! This high caliber local event is a great way to update your skills and network without incurring the cost of travel to a national conference. Here is some feedback from attendees this year:

*“Great mix of tracks for novice and advanced development professionals.”*

— Dino Hernandez, Lawrence Technological University

*“Really great day of training. Timely and very useful information for development officers!”*

— Kimberly Wilcox, Avalon Housing

*“Excellent opportunity to network with professionals in the planned giving community.”*

— Steve Solys, Legacy Private Capital

We are continuing our presence on YouTube at [www.youtube.com/user/LeaveALegacySEMICH](http://www.youtube.com/user/LeaveALegacySEMICH). Using content from our public service announcements, cable programs, and roundtable programs, we are reaching residents throughout Southeast Michigan and beyond!

I would like to thank our co-chairs, Victoria Cornwell, Gayle Good, and Chris Belcher. Through their volunteer leadership and involvement, we continue to fulfill our mission of raising awareness and encouraging legacy gifts.

Please read about this important program made possible through funding by our partners in charitable organizations and the planned giving community. We want to hear from you how LEAVE A LEGACY can further assist our community. Please contact me at [pgtsem@gmail.com](mailto:pgtsem@gmail.com).

Lori B. Angel, Executive Director

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

### Educational Programs

Development Day was held on June 2, 2011, at The Fairlane Club in Dearborn, co-sponsored with the Association of Fundraising Professionals — Greater Detroit Chapter. This day-long conference offering both basic and advanced educational topics was presented by national and local planned giving experts. We had registrations from 165 people across the state, representing development professionals and board members from Michigan charities, community foundations, and various allied professionals (attorneys, accountants, and financial planners) from the planned giving community.

A joint meeting with the Financial & Estate Planning Council of Detroit was held on November 9, 2010, at the Federal Reserve in Detroit. Speaker Stacy Eastland, managing director of Goldman Sachs & Co., presented to more than 140 attendees.

### County Representatives — Community Outreach

The following individuals served as County Representatives:

1. Genesee — Brenda Wehri, Genesys Health Foundation
2. Lapeer — Lori B. Angel, PGRTSEM
3. Lenawee — Suann Hammersmith, Lenawee Community Foundation
4. Livingston — Christopher L. Belcher, Fifth Third Bank
5. Macomb — Felicia Harris, Ameriprise Financial

6. Monroe — Laura Schultz, American Red Cross
7. Oakland — James A. Boucher, Vestevich, Mallender, Dubois & Dristas, PC
8. St. Clair — Matthew M. Wallace, Matthew M. Wallace, P.C.
9. Washtenaw — Donna J. Snyder, University of Michigan, and Doug Gross, Raymond James
10. Wayne — Open

Our Speakers Bureau has more than 20 highly qualified speakers who volunteer to give presentations to civic or religious groups, directors, staff, clients, and donors on legacy giving. Please contact our office at 888.826.7900 to arrange a speaker at your next meeting or event. Presentations were made to many organizations and service clubs this year, such as:

- Bishop Kelley Catholic School Alumni — Lapeer
- Manresa Jesuit Retreat House — Oakland
- Novi Public Library — Oakland
- Memorial Healthcare Foundation — Shiawassee
- Catholic Social Services — Washtenaw
- Chelsea Senior Center — Washtenaw
- Housing Bureau for Seniors — Washtenaw
- Archdiocese of Detroit, Parish Business Managers — Wayne
- St. Cyprian Parish — Wayne

Members of our Speakers Bureau have been featured in the following local television programs:

- **John Prost Show**, Grosse Pointe Cable, April, 2011
- **Monroe Alive**, May, 2011

The LEAVE A LEGACY program and donor stories were featured in the following publications:

- “Planning for Charitable Gifts,” The Times Herald, (St. Clair) February 2011
- The Burton View, (Genesee) May 2011
- Member Spotlight — LEAVE A LEGACY/Planned Giving Roundtable, Links Magazine, Michigan Nonprofit Association, January 2011
- “Plan on Planned Giving,” Links Magazine, Michigan Nonprofit Association Magazine, January 2011
- Stefan Donor Story, Plante Moran Trust — Universal Advisor Magazine, 2011 — Issue 1

### Radio Advertising Campaign

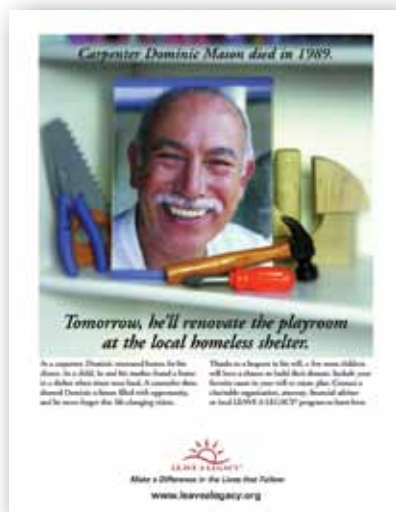
A targeted radio campaign featuring a 60-second customized commercial for our Southeast Michigan market encouraged listeners to remember charities in their estate planning. We purchased ad time on both **WWJ-AM (950)** and **WJR-AM (760)** for the campaign (a combined 30+ spots per weekend) which ran on Saturday and Sunday from April 30 through May 22.

WWJ is the #1 rated station in the market for all people over the age of 50, and WJR is ranked second in that demographic category. This radio campaign reached a combined cumulative audience of more than 930,000 listeners during its four-week run on the two stations.

- The radio campaign ad was made available to our 2011 partners for use on their websites

### 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, public service announcements, 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 2011 partners
- YouTube channel [www.youtube.com/user/LeaveALegacySEMich](http://www.youtube.com/user/LeaveALegacySEMich)
- 28 campaign partners have been licensed to use the trademarked logo and tagline “Make a Difference in the Lives that Follow.” Many use it within their email signatures and in newsletters, brochures, and annual reports.
- A press release was prepared for each partners’ local community paper announcing their participation in the 2011 campaign.
- **State of Michigan** — Governor Rick Snyder’s proclamation of May as LEAVE A LEGACY month

We invite you to visit our local website [www.leavealegacysouth-eastmichigan.org](http://www.leavealegacysouth-eastmichigan.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.

### A Message from the Co-Chairs

LEAVE A LEGACY is a program of the Planned Giving Roundtable of Southeast Michigan. Under the roundtable’s leadership, the program raised \$28,700 this year for our public awareness campaign. Our primary expenses were for staff, public relations, advertising, and Development Day. The Planned Giving Roundtable is an affiliate of the Partnership for Philanthropic Planning.

To execute important aspects of the LEAVE A LEGACY campaign, the Roundtable continues to engage the services of Tanner Friedman, a strategic communications firm based in Farmington Hills, to provide professional guidance in a fast changing media climate. Tanner Friedman has helped craft the campaign’s message and uses media relationships to cost effectively run the annual radio campaign. It has also helped the Roundtable have a more prominent role in the Crain’s Detroit Business planned giving coverage. In the coming year, we’ll explore the best ways to deliver our message to the community, including our website and other “new media” platforms.

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.

#### Victoria J. Cornwell

St. Jude Children’s Research Hospital

#### Gayle M. Good

Macomb Community College Foundation

#### Christopher L. Belcher

Fifth Third Private Bank

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Printing compliments of Plante Moran Trust.

*We sincerely thank our partners for their generosity and participation in the 2011 LEAVE A LEGACY campaign.*

### **Business Partners (\$1,000–\$4,999)**

Community Foundation for Southeast Michigan  
Group Associates, Inc.  
Miller, Canfield Paddock and Stone, PLC  
Plante Moran Trust  
The Herbert & Elsa Ponting Foundation  
The Salvation Army

### **Benefactor (\$500–\$999)**

Berry Moorman, PC  
Clark Hill, PLC

### **Non-Profit Friend (\$300–\$499)**

Angela Hospice  
Ann Arbor Area Community Foundation  
Archdiocese of Detroit  
Avant Advisors, PLLC  
Barbara Ann Karmanos Cancer Institute  
Beaumont Foundation  
The Children's Center  
Coalition on Temporary Shelter (COTS)  
College for Creative Studies  
Community Foundation of Greater Flint  
Eastern Michigan University Foundation  
Epilepsy Foundation of Michigan  
Evangelical Homes of Michigan  
Genesys Health Foundation  
Greenhills School  
JVS  
Jewish Federation of Metropolitan Detroit  
Judson Center  
Lawrence Technological University  
Leader Dogs for the Blind  
Lenawee Community Foundation  
Macomb Community College Foundation  
Madonna University  
Marian High School  
Merrill Lynch-Private Banking Investment Group  
Port Huron Hospital Foundation  
Rose Hill Center  
St. John Health System Foundation  
St. Joseph Mercy Health System  
Starfish Family Services  
United Methodist Retirement Communities Heritage Foundation  
University Liggett School  
University of Michigan  
Washtenaw Community College Foundation  
YMCA of Metropolitan Detroit

### **Individual Friend (\$100–\$299)**

Terry R. Altman  
Donald Baker  
D. Gregory Baker  
Michael W. Bartnik  
Christopher L. Belcher  
Thomas H. Bergh  
Daniel H. Boyce  
Sandra Kirtley Campbell  
John M. Dankovich  
Thomas E. Dew  
Raymond A. J. Digby  
George W. Gregory  
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Henry M. Grix  
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John C. Prost  
Jo Rosen  
Ralph S. Rumsey  
Kurt M. Sebaly  
Donna J. Snyder  
Kim-Lan Trinh  
Sam Ventimiglia  
Matthew M. Wallace  
Milton W. Weidmayer

### **Development Day Sponsors**

#### *Silver*

Comerica Charitable Trust

#### *Bronze*

Fifth Third Private Bank  
PNC Wealth Management  
Visionary Marketing Group

#### *Exhibitors*

Michigan Nonprofit Association  
The Stelter Company  
Tanner Friedman Strategic Communications

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.