

Impactful **SOLUTIONS**
for Increasing
Major & Planned Gifts

Crescendo

Integrated Marketing for Planned Gifts



Websites



Training



Software



Analytics



Print



Social Media



Email



Videos

Build Strong DONOR Relationships

With 30+ years of experience, Crescendo Interactive offers a marketing system that creates donor leads and closes major and planned gifts for your organization. Crescendo's products are built and supported by a staff of in-house technical, legal, design and marketing specialists to meet all your needs.

- Mobile-friendly websites
- Email campaigns
- Royalty-free literature
- Custom videos
- Content management system
- Donor proposal software
- Web to print literature
- Donor analytics
- Gift calculators
- Social media content
- Gift agreements
- Customer support & more

Crescendo

Integrated Marketing for Planned Gifts

110 Camino Ruiz
Camarillo, CA 93012
800-858-9154
crescendointeractive.com

“With Crescendo's marketing, we are able to reach more alumni and friends than ever before. Since starting to use Crescendo's tools and services, we have booked over \$92 million in planned gifts!”

Tammy Wernke

*Assistant Director, Gift Planning
University of Cincinnati Foundation*



“We are extremely happy with Crescendo's products and customer service. In four years, Hoag Hospital Foundation raised more than \$90 million in planned gifts.”

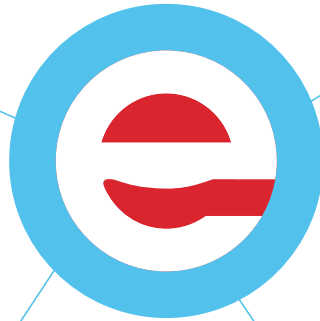
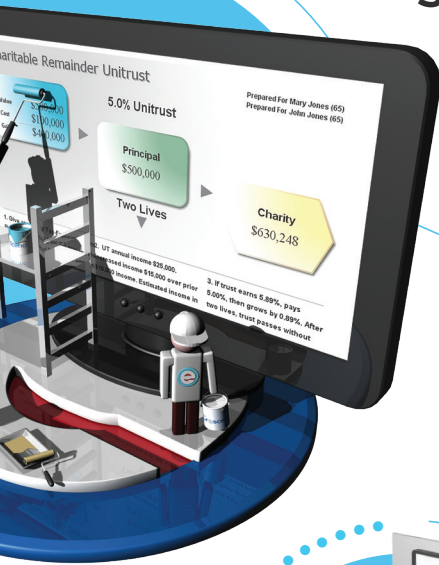
Julie Heggeness

*Executive Director, Gift Planning
Hoag Hospital Foundation*



Software

Donor proposals, presentations, calculations, gift analysis & more



Marketing

Websites, mobile, newsletters, social media, web to print literature & more



Training

Seminars, webinars & annual conference



Administration

Tools for administering gift annuities

“ In the last five years, Baylor has documented 226 new planned gifts for approximately \$139 million and realized 162 estate distributions of over \$54 million. Baylor highly values the tools and support provided by Crescendo' staff. ”

Larry Smith

*Assistant Vice President, Gift Planning
Baylor University*



“ Planned giving has been a crucial part of our development efforts since our inception nearly 35 years ago, and Crescendo has been a partner in that effort for over 20 of those years. Our total gifts over the past five years have exceeded \$350 million! ”

Stephanie Judson

*President
South Dakota Community Foundation*



Websites & Marketing

Our signature marketing package – GiftLegacy – features a wide variety of web, email, social media and print solutions to increase your organization's planned and major gifts. Our integrated system helps you build stronger donor and professional advisor relationships.

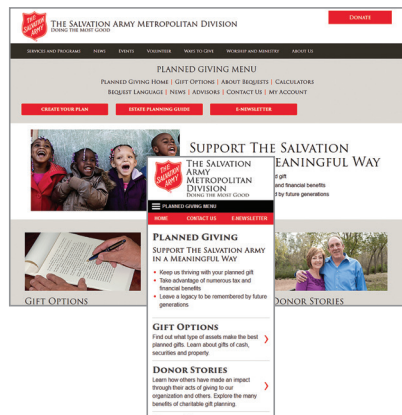


A strong online presence plays a crucial role in the success of your planned gifts marketing. Our GiftLegacy website includes your organization's branding and features motivating donor stories, regularly updated articles, engaging videos, an online wills planner, personal gift illustrations, advisor information, analytics and more.

The GiftLegacy Pro package also includes a mobile-friendly version of your website so that you can reach more donors using mobile phones and tablets along with desktop computers.



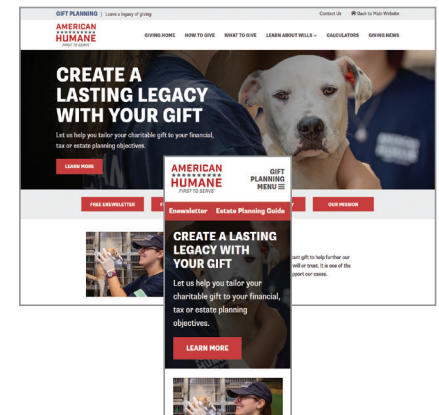
Coast Guard Foundation
cgfdn.giftlegacy.com



The Salvation Army
 Metropolitan Division
salarmygift.org



Air Force Museum Foundation
afmuseumlegacy.org



American Humane
giving.americanhumane.org



Widgets

Streamline donor giving with dynamic website widgets for donor advised funds (DAFs), IRA rollover gifts and beneficiary designation gifts.

Cancer Research Institute
cancerresearch.giftlegacy.com

Habitat for Humanity
 Greater Los Angeles
habitatla.giftlegacy.com

CARE
care.giftlegacy.com

Emails



Email is a highly efficient and cost-effective method to reach your donors and prospects. We provide the GiftLegacy newsletter for donors and the GiftLaw newsletter for professional advisors. You may also create and send custom eblasts — short emails focused on specific subjects or announcements — through our system.

Each email contains your branding and includes timely articles, impactful stories as well as links directing readers to your website.



hoag
Hospital Foundation

Benefit your family while impacting Hoag's future

It's never too late to plan for the people and causes you care about. If you are thinking about the future and want to get started creating or updating your estate plan, we can help!

We would like to give you a FREE copy of Hoag Hospital Foundation's downloadable **Wills Guide**. This easy-to-use guide can help you gather the information you need before you meet with your estate planning attorney.

Part of the Legacy

If you care about the work of Hoag Hospital Foundation, the information

Hoag Hospital Foundation

SECURITY TODAY FOR A BRIGHTER FUTURE TOMORROW

Giving to Michigan Tech Has Benefits

If you've been looking for a way to protect against fluctuating market values, consider the security of a charitable gift annuity. By creating a gift annuity, you not only provide fixed payments for yourself, but may also benefit from a charitable tax deduction this year and support the program of your choice in the future.

In addition to the satisfaction of knowing your gift made a difference, other benefits of a charitable gift annuity include:

- Income tax savings
- Capital gains tax avoidance
- Possible tax-free payments

Contact us at giftplan@mtu.edu or 906-487-3305 for a detailed illustration with your gift annuity payment and tax benefits.

Michigan Technological University

OKLAHOMA CITY COMMUNITY FOUNDATION
Helping you help the community

Provide for your family while impacting our community

Create Your Legacy with Our Free Wills Guide

Creating a plan for the future is one of the best ways to ensure your loved ones will be well cared for after you are gone. With proper planning, you can also help the charities and causes that mean the most to you and create a lasting personal legacy.

Oklahoma City Community Foundation

THE UNIVERSITY of NORTH CAROLINA at CHAPEL HILL

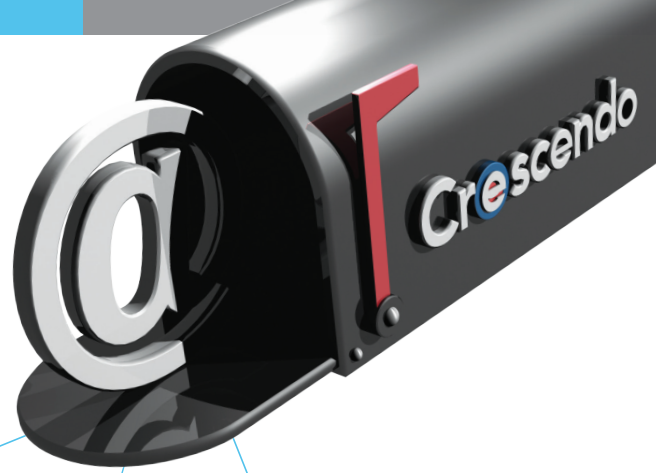
Be a **CHANGE LEADER**

Partner with UNC-Chapel Hill and Help Solve the World's Greatest Problems

The University of North Carolina at Chapel Hill continues to be a change leader, setting out on a bold course to improve society and help solve the world's most pressing problems. Your support is critical to helping us educate the next generation of leaders.

Now, more than ever, Carolina's future and that of our society depend on the generosity of alumni and friends, like you, to advance the work of the University tomorrow.

UNC-Chapel Hill



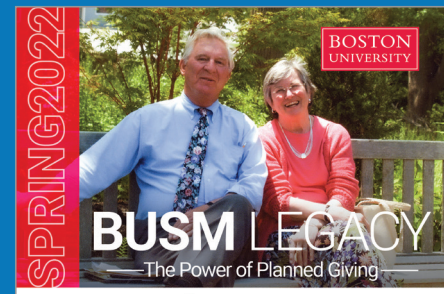
Royalty-Free Literature

Our GiftLegacy package gives you access to hundreds of royalty-free marketing pieces such as ads, brochures, briefs, postcards, inserts, quarterly print newsletters, wills guides and more. Each piece features several design styles from which to choose.



Custom Designs

We can create custom designs for your organization, including ads, brochures, newsletters, postcards, wills guides and more.



Honoring a mentor | who changed Lives

The life of **Charles Michael Bliss, Sr.** (M.D. '63; Parent M.D. '89), changed when Franz J. Ingelfinger, M.D., offered him a position in the Gastroenterology Fellowship Training Program at Boston University School of Medicine, a program the esteemed BU professor founded in 1945. The year was 1965, and Bliss had just returned from a year as a medic in Vietnam, caring for injured soldiers. He had served as an intern under Ingelfinger and even saw him "for a moment," he says.

In Vietnam, where Ingelfinger was investigating the causes of diarrhea among the troops.

"When I completed my Army career, I visited Dr. Ingelfinger and asked him if he had any jobs available for me," says Bliss. "And he said, 'Well, Mike, I'm sorry, there's no room for your residency, but how would you like to be a gastroenterology fellow?'" said to him, knowing full well that he knew that I knew I had no other choice. "Well, is gastroenterology any good?"

He answered, very seriously, "Well, it's always been very good to me!"

"Now, I told that story to a large group of famous gastroenterologists at an annual American Gastroenterological Association meeting in 2001 when I received a Distinguished Clinician Award. And this group of prominent docs laughed out loud. They thought it was a great story."

Ingelfinger served as chief of the gastroenterology clinic at

(continued on next page)

A BOSTON UNIVERSITY SCHOOL OF MEDICINE GUIDE TO TAX-WISE CHARITABLE PLANNING STRATEGIES



“When marketing the idea of legacy giving, it’s essential to have multiple ways to connect with prospective donors. Crescendo has empowered me with great resources. Since launching with Crescendo in 2012, Chapman has secured over \$153 million in planned gifts.”



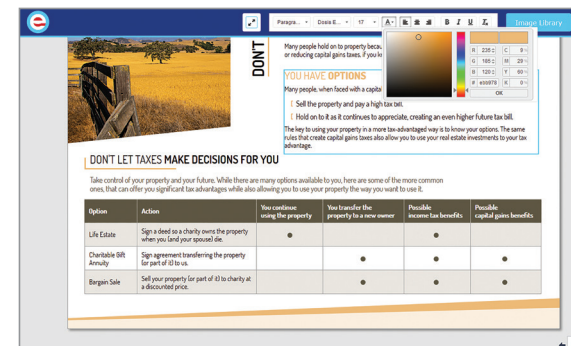
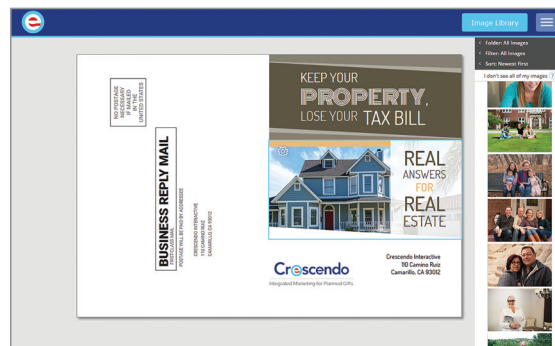
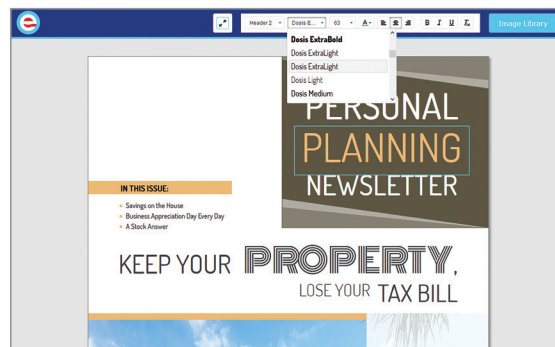
David Moore
Director, Legacy Planning
Chapman University

Clockwise: Boston University,
Cancer Research Institute &
University of Arkansas

Web to Print



CresPrint™ is our easy-to-use online literature customization program. It allows you to personalize your literature for print marketing and send it to a desktop printer or print shop for production and mailing. You can select from newsletters, brochures, postcards, wills guides and more. Your pieces will include your organization's colors, branding, images and contact information.



CresPrint Interface



Crescendo



Survey Creation - CresSurvey

Donor surveys are a way to understand your donors' interests and engage them to support your cause. With the CresSurvey tool, you can gather information about your donors' preferences, discover what motivates your donors to give and encourage them to make and acknowledge their gifts to your organization.



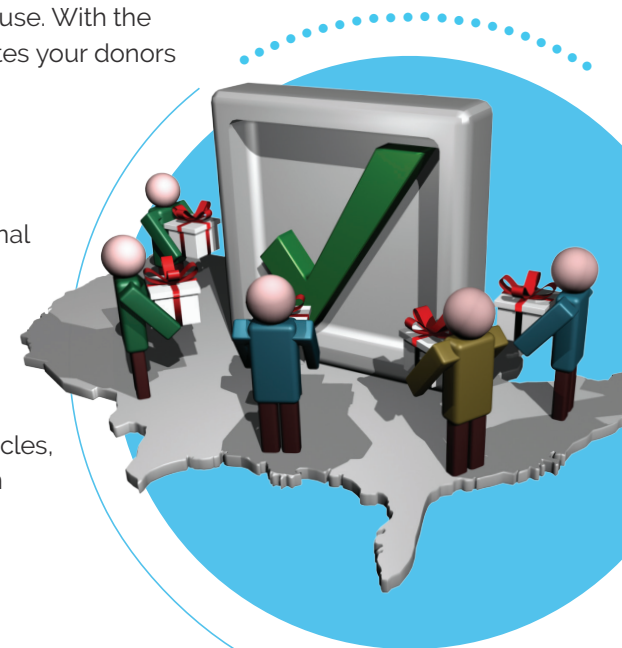
Advisor Resources - GiftLaw

We provide web pages with continually updated content for attorneys, CPAs and other professional advisors, online calculators to help them discuss charitable plans with their clients and an online network to connect your charity with charitable planning attorneys throughout the country.



Analytics, Social Media, Mission Video & More

Other features of our GiftLegacy marketing system include social media integration with timely articles, web analytics available in our powerful back-end management system and a personalized mission video that introduces your web visitors to the work and mission of your organization.



Software

Crescendo provides powerful software solutions for marketing, closing and administrating gifts. We offer three service levels of donor proposal software: CresPro (comprehensive), CresEstate (mid-level) and CresLite (basic). These proposal software products are now cloud-based. Your annual service contract includes regular tax updates, the GiftLaw Pro charitable tax reference and attorney phone support five days a week.



Comprehensive Gift Plans (CresPro)

CresPro delivers everything you need to illustrate and close major and planned gifts. From persuasive donor-friendly proposals to detailed technical explanations, trust documents and the GiftLaw Pro charitable tax reference, CresPro is the most comprehensive planned gifts marketing software package available. When pairing CresPro with our GiftLegacy Pro marketing service, you can create and print "magazine-quality" donor proposals.



Charitable Tax Proposals (CresEstate)

CresEstate features the most common charitable tax plans used by professional advisors (attorneys, CPAs, financial planners and underwriters). The software includes client illustrations, gift calculations, technical explanations, trust documents and the GiftLaw Pro tax reference.



“Crescendo provided us the tools to connect with more prospects than ever before. Together, we will continue to leave a legacy that will make life better for children with gifts totaling \$25 million and counting!”

Nicola Lawrence MSc CAP®CFRE
Director, Legacy and Gift Planning
Children's Medical Center Foundation



“We launched a website with valuable information and began to implement our newsletters. We now have over 2,000 donors in our database and 90 advisors. Since we started using Crescendo, we have raised over \$74 million in planned gifts!”

Kimberly Jetton
Director of Planned Giving
Archdiocese of Los Angeles





Basic Gift Plans (CresLite)

Use CresLite to create the most popular gift proposals. Create donor proposals for basic planned gifts along with technical explanations, gift documents and more.



Gift Annuity Administration (Crescendo Admin)

Crescendo Admin's powerful tracking system simplifies in-house gift annuity administration and interfaces with CresPro and CresLite for easy data entry. Its tracking system produces checks to annuitants, year-end 1099Rs, detailed reports, marketing letters and more.



Gift Annuity Marketer

Create attractive and persuasive two-page color proposals that show your donors the benefits of a charitable gift annuity in a friendly letter format. Send to two or 10,000 donors and close repeat gift annuities.



Training

Are you marketing gifts in the right places? How do your donors like to receive information from you? Do you need to learn more about marketing charitable bequests and blended gifts, creating charitable gift annuities and structuring charitable remainder trusts? **Our seminars, webinars and annual Practical Planned Giving Conference will give you the knowledge you need to reach your donors and close major and planned gifts.**



Integrated Marketing Seminar

What types of messages resonate with donors? What keywords and phrases prompt donors to act? The Integrated Marketing Seminar will provide insights into positive marketing messages and share successful examples of messaging that works. You will walk away with practical ideas for web, email, print and social media marketing to help you engage your donors and close more gifts.



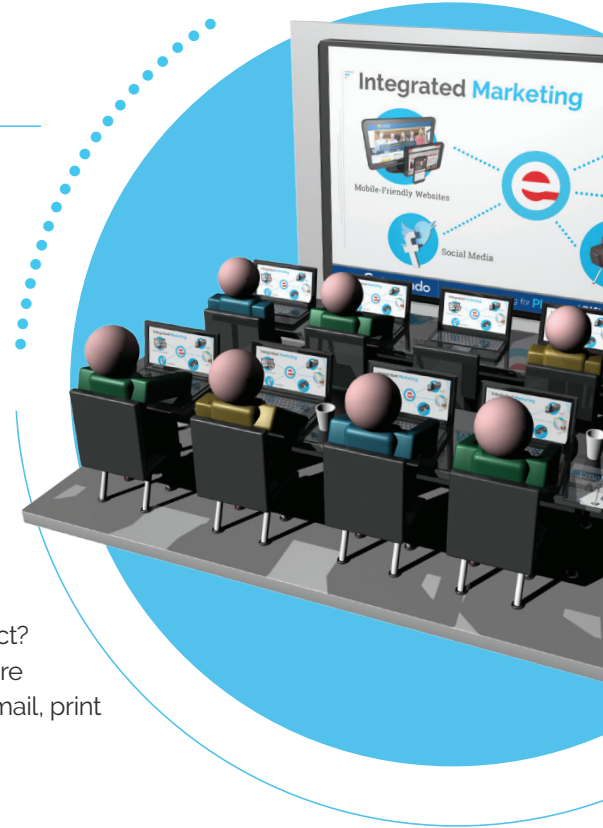
Major & Blended Gifts Seminar

Your donors have more reason than ever to make major, blended and planned gifts under the new tax law. The Major & Blended Gifts Seminar will provide the tools to conduct successful donor visits and create custom donor proposals like those used by charities engaged in billion dollar campaigns – at a fraction of the time and cost. Learn how to approach donors for major gifts, illustrate the benefits of blended and planned gifts and produce motivating and effective presentations to close these gifts.



Comprehensive Seminar

From data entry to planned giving basics, learn the full power of CresPro cloud software. Experienced fundraisers, beginners and assistants will benefit from exploring the most popular gift options that donors will want to consider. Gain valuable knowledge about these gifts as well as hands-on experience running personalized donor proposals.





Advanced Seminar

This seminar is designed for those ready to take the next step in planned giving education. Learn about the most creative and complex planning strategies. Topics include discussion of education and retirement unitrusts, lead trusts, family corporations, gifts of IRAs and pension plans, unitrusts with insurance replacement and more.



Business Planning Seminar

Explore sophisticated charitable planning techniques for business owners, including planning for owners who wish to retire and sell a business or transfer the business to family members. You will also learn about zero-tax plans for large estates.



Practical Planned Giving Conference (PPGC)

Experience two days with ideas and strategies to take your planned giving knowledge to new heights. Over 30 industry experts will motivate you with 48 breakout sessions and six tracks at our annual Practical Planned Giving Conference (PPGC).



Webinars

We offer a wide variety of free webinars for your convenience. Our webinars cover many aspects of planned giving such as gift annuity basics, charitable beneficiary designations, blended gifts, bequest campaigns, marketing strategies and more.



Marketing Education (CresCoaching)

CresCoaching is a four-week webinar series to help you build an effective planned gifts marketing program to close more gifts and grow your legacy society. CresCoaching provides a framework to implement a successful marketing plan that includes bequest campaign strategies, IRA rollover marketing ideas, and tools to promote major and blended gifts.



Online Learning (GiftCollege)

GiftCollege is an interactive elearning program. It features over 100 videos with articles and allows you to customize the curriculum to meet your educational goals.



Gift Annuity Administration

GiftAnnuities 1·2·3 is a service that helps charities administer charitable gift annuities and comply with state requirements. We provide expert and ongoing support as you manage your gift annuities. GiftAnnuities 1·2·3 empowers your organization by providing the tools necessary to obtain and administer gift annuities.



State Registration, Notification & Filing Fees

State registration can be a challenging process with the required submission of numerous documents and detailed financial data. Crescendo helps organizations compile and submit registration or notification information and track the progress of the organization's status with each applicable state.



State Regulatory Compliance

Gift annuities are subject to regulation by the State Insurance Commissioner in most states. A gift annuity is regulated by the law of the state where the donor has legal residency. Visit crescendointeractive.com or contact us to learn about state gift annuity requirements.



ACGA Rates

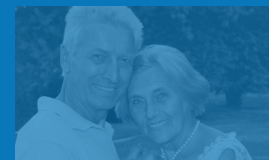
The American Council on Gift Annuities (ACGA) publishes the suggested charitable gift annuity rates used by most charities. Crescendo supports ACGA's gift annuity best practices. The ACGA rates are included in Crescendo marketing and software packages.



Gift Annuity Administration Software (Crescendo Admin)

Crescendo Admin's powerful tracking system simplifies in-house gift annuity administration and interfaces with CresPro and CresLite for easy data entry. Its tracking system produces checks to annuitants, year-end 1099Rs, detailed reports, marketing letters and more.





ENLIGHTEN YOUR
PROSPECTS
to give

Learn how Crescendo can create a **results-driven marketing strategy** for your organization.

Visit crescendointeractive.com or call us at 800-858-9154 for a free demo.



Integrated Marketing for Planned Gifts



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