

LEAD CONVERSION

Helping people of all beliefs.



Catholic Charities
CHERISHING THE DIVINE WITHIN

echo's Data Driven Communication Enhances Gift Annuity Program Outreach.

the company

Catholic Charities of the Archdiocese of Baltimore cares for more than 160,000 people and serves over a quarter million meals every year to those who are hungry. Eighty programs offer a diverse array of services in Baltimore City and Baltimore, Harford, Howard, Carroll, Anne Arundel, Frederick, Washington, and Garrett Counties of Maryland.

They care for children and families, people who are poor and disadvantaged, seniors, and those who have developmental disabilities. Their mission is to improve

lives by offering meaningful help, so that every person can realize her or his full potential.

Today, Catholic Charities is the leading private provider of human services in Maryland, widely known for creative and compassionate caregiving and for developing programs aimed at self sufficiency; 90 cents of every dollar goes to direct service. 10,000 volunteers, 20,000 donors and 2,100 employees are comprised of people of all faiths.

the challenge

Previously, Catholic Charities sent static post cards aimed at soliciting people to contribute to a charitable gift annuity.

In exchange for their contractual gift, Catholic Charities would guarantee life-time annual payments

based on age with a portion of the payments being tax-deductible for a period of years, with the first donation year qualifying the donor for an immediate tax deduction. Due to the complexity of an annuity vs. a direct donation, it was difficult to convey on a small postcard.

the solution

Catholic Charities' Director of Gift Planning, along with **echo's** internal sales and creative team worked together to create a strategic double-paneled postcard with increased graphic content. A chart was added that narrated how the donation and tax deductions worked. Photos were added and changed dynamically based upon a donor's area of interest: general services, human interest, Our Daily Bread, children, elderly, developmental disabilities, adoption services and women's programs.

The client provided data individualized the piece by:

- Age
- Donation amount
- Program(s) of interest
- Program specialty phrase
- Gender
- Marital status

The addition of personalization enhanced the message's relevancy to the recipient and the detailed chart simplified the explanation of an annuity gift.

CHARITABLE GIFT ANNUITIES

A charitable gift that makes your income rise! Earn between 5% and 11.3% while helping **Program** **Phrase**

Open here to see how it works

Rebecca's Recipes for Planning Gifts
Catholic Charities

Variable Sample



Photos varied based upon recipient past giving history: general services, human interest, Our Daily Bread, children, elderly, developmental disabilities, adoption services and women's programs.

Variable areas based upon recipient data

With a Catholic Charities Charitable Gift Annuity, you can make a generous contribution to **Program** and receive income for life.

Increase your retirement income while supporting **Program**. A charitable gift annuity is a simple contract between you and Catholic Charities. In exchange for your gift, we guarantee you life-time annual payments. Payments are based on your age. A portion of your payments will be tax-free for a period of years and you will qualify for an immediate tax deduction in the year you make the gift.

Here's how it works:

Mary and George make a \$10,000 donation (minimum amount required is \$5,000)



They receive \$Payment (Percentage%) every year for as long as they live. \$Tax-free of their payments will be tax-free for a period of years and they qualify for a charitable income tax deduction of \$Deduction. (These amounts will vary slightly depending on the timing of the gift.)

Request your free benefits summary, at no obligation, by contacting Rebecca Rothey, Catholic Charities' Director of Gift Planning, at 410-625-8488, toll free at 1-866-486-6140 or at rrothey@cc-md.org.

Chart based upon married, single, sex and gender. Mathematical explanation with variable information relevant to recipient.

Recipient 1:

Single Male
Age 58
Anna's House/
Woman and Children

With a Catholic Charities Charitable Gift Annuity, you can make a generous contribution to **Anna's House** and receive income for life.

Increase your retirement income while supporting **Anna's House**. A charitable gift annuity is a simple contract between you and Catholic Charities. In exchange for your gift, we guarantee you life-time annual payments. Payments are based on your age. A portion of your payments will be tax-free for a period of years and you will qualify for an immediate tax deduction in the year you make the gift.



Here's how it works:

George makes a \$10,000 donation (minimum amount required is \$5,000)



He receives \$570 (5.7%) every year for as long as he lives. \$250 of his payments will be tax-free for a period of years and he qualifies for a charitable income tax deduction of \$3,562. (These amounts will vary slightly depending on the timing of the gift.)

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Recipient 2:

Married Couple
Ages 64 & 62
General Contribution
to Catholic Charities

With a Catholic Charities Charitable Gift Annuity, you can make a generous contribution to **Catholic Charities** and receive income for life.

Increase your retirement income while supporting **Catholic Charities**. A charitable gift annuity is a simple contract between you and Catholic Charities. In exchange for your gift, we guarantee you life-time annual payments. Payments are based on your age. A portion of your payments will be tax-free for a period of years and you will qualify for an immediate tax deduction in the year you make the gift.



Here's how it works:

Mary and George make a \$10,000 donation (minimum amount required is \$5,000)



They receive \$550 (5.5%) every year for as long as they live. \$250 of their payments will be tax-free for a period of years and they qualify for a charitable income tax deduction of \$3,300. (These amounts will vary slightly depending on the timing of the gift.)

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Recipient 3:

Single Female
Age 68
Senior Housing/Seniors

With a Catholic Charities Charitable Gift Annuity, you can make a generous contribution to **Senior Housing** and receive income for life.

Increase your retirement income while supporting **Senior Housing**. A charitable gift annuity is a simple contract between you and Catholic Charities. In exchange for your gift, we guarantee you life-time annual payments. Payments are based on your age. A portion of your payments will be tax-free for a period of years and you will qualify for an immediate tax deduction in the year you make the gift.



Here's how it works:

Mary makes a \$10,000 donation (minimum amount required is \$5,000)



She receives \$430 (4.3%) every year for as long as she lives. \$326 of her payments will be tax-free for a period of years and she qualifies for a charitable income tax deduction of \$4,266. (These amounts will vary slightly depending on the timing of the gift.)

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