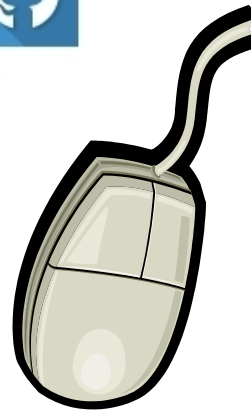


Click By Click

An overview of how Southern California nonprofits and allied professionals are engaging their audiences via social media about gift planning

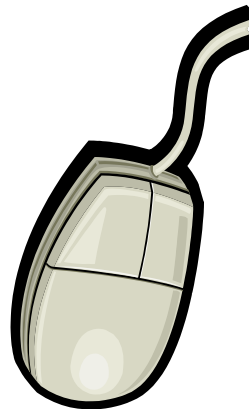
Presented for PPP-LA by:
David B. Moore
Director, Planned Giving
Chapman University

Social Media Icons



TODAY

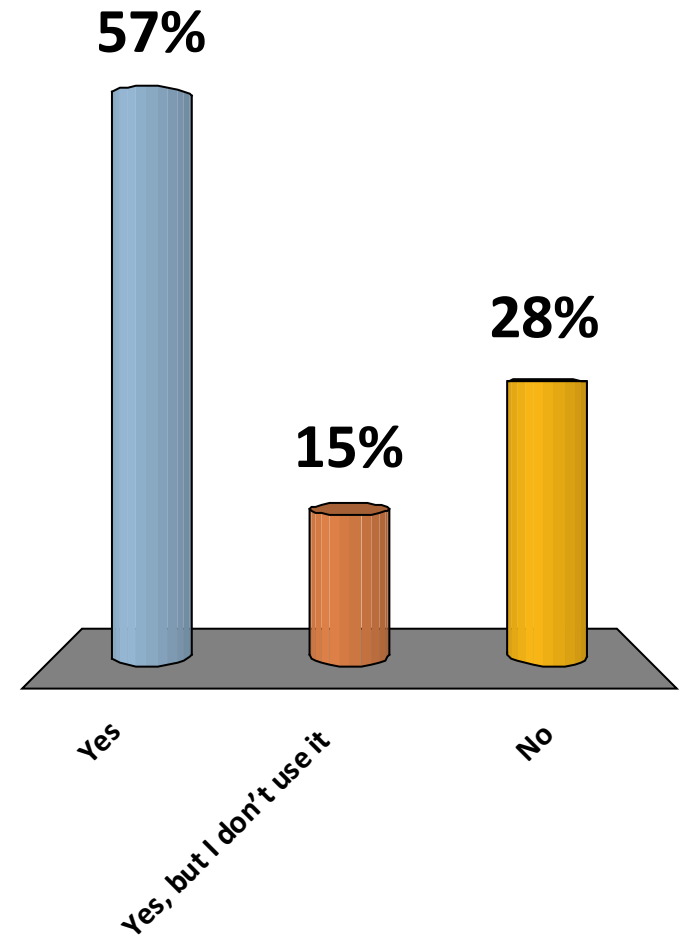
- ▶ See what's being done in social media to encourage gift planning
 - ▶ Focus on Southern California, but not always
- ▶ Explore examples in a variety of platforms
- ▶ Be interactive
- ▶ Have some open discussion
 - You suggest more and better examples for all of us
- ▶ Consider your options
- ▶ Walk away with some fresh ideas



FACEBOOK POLL

Do you have a personal Facebook account?

- A. Yes
- B. Yes, but I don't use it
- C. No

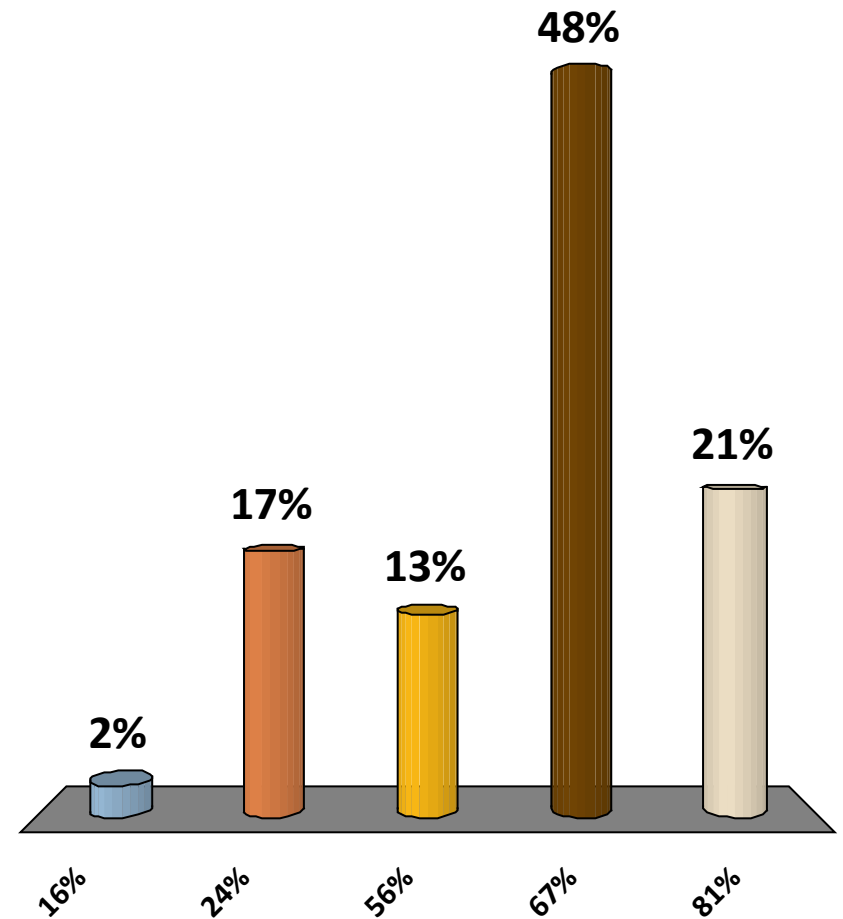


FACEBOOK POLL

What % of internet users have a Facebook account?

- A. 16%
- B. 24%
- C. 56%
- D. 67%
- E. 81%

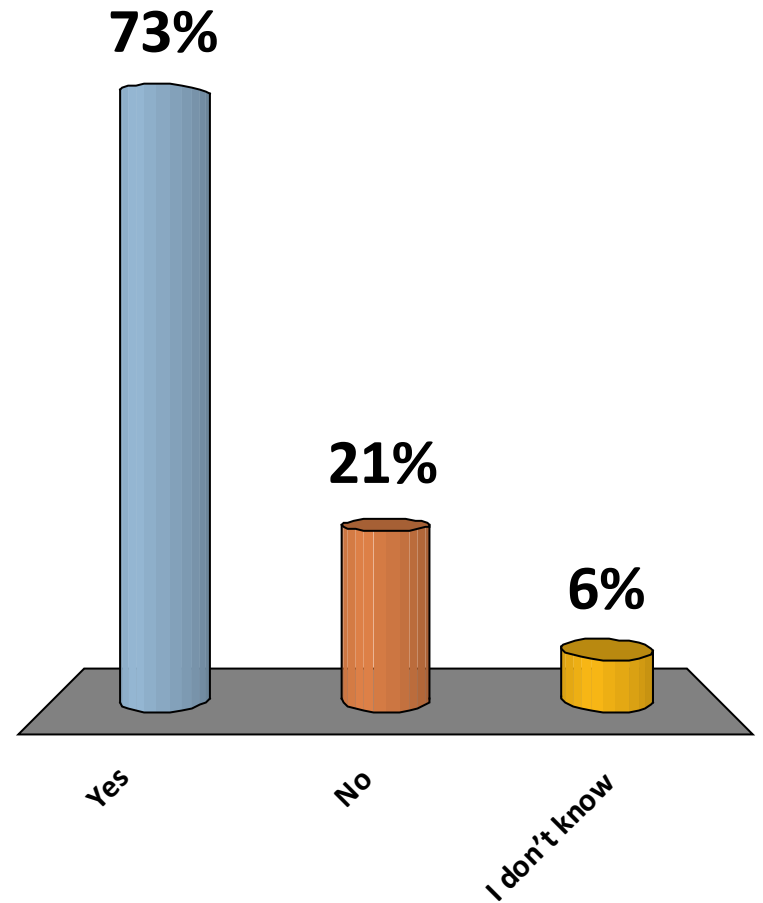
Source: Pew Research Center's Internet & American Life Project Post-Election Survey, Nov. 14-Dec. 09, 2012. Released February 2013.



FACEBOOK POLL

Does your organization have a Facebook account?

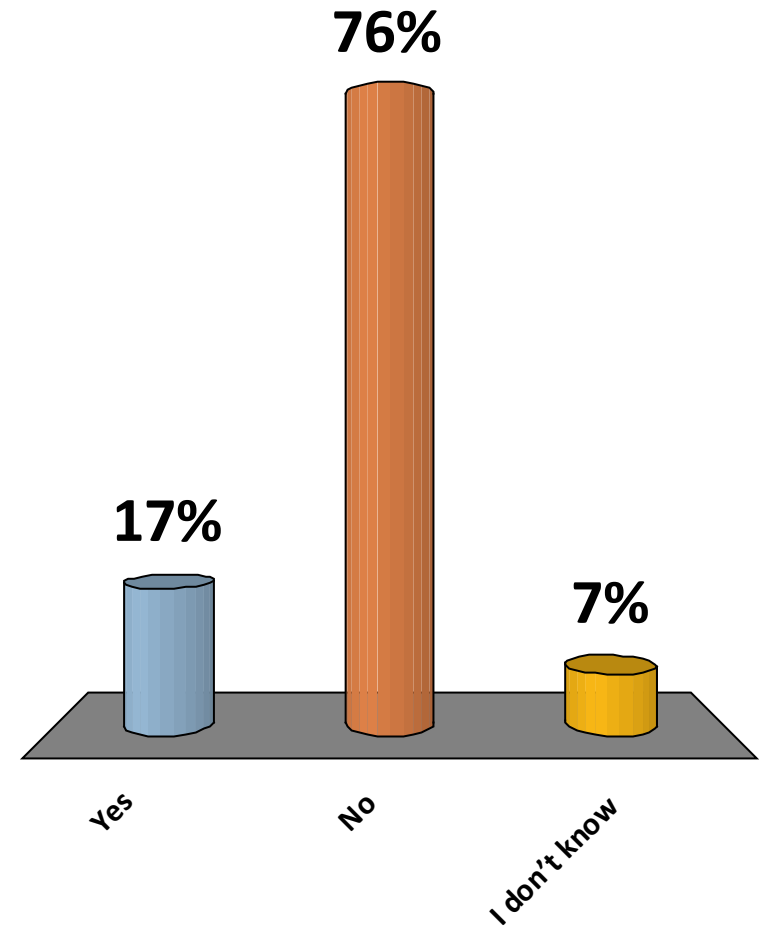
- A. Yes
- B. No
- C. I don't know



FACEBOOK POLL

Does gift planning info get posted to that account?

- A. Yes
- B. No
- C. I don't know



FACEBOOK

- ▶ CHOC: Children's Hospital of Orange County
 - General site's giving posts

The screenshot shows the Facebook profile for CHOC Children's. The cover photo features the hospital building with the text "The future's bright. Today the future is bigger and brighter than ever before." and a "BEST CHILDREN'S HOSPITALS US NEWS & WORLD REPORT RANKED IN 6 SPECIALTIES 2013-14" award badge. The profile picture is the CHOC Children's logo. The page shows 43,090 likes and 1,352 people talking about this. Navigation buttons for Photos, Likes, Email Signup, and Events are visible at the bottom.

This screenshot shows a Facebook post from CHOC Children's dated February 27. The post features a photo of a young boy, Alex, standing behind a large collection of LEGO sets. The text of the post reads: "Help Alex and his mom Janell reach their goal of donating 1,000 Legos sets to CHOC through Legos for Leukemia (Orange). If interested in helping, please email miqueyang@b@hotmail.com." The post has 318 likes and 60 shares. Comments from users like Erika Pedraza Abarca and Lisa Gonzales-Solomon are visible.

This screenshot shows a Facebook post from CHOC Children's dated October 22, 2012. The post features a photo of a man, Keturah, and two young girls, all wearing red CHOC t-shirts. The text of the post reads: "We just had to share this adorable photo of one of our patients, Keturah, and Nick Cannon, entertainer and current host of America's Got Talent, at Family Day 2012 for Children's Miracle Network hospitals. CHOC is proud to be a part of Children's Miracle Network!" The post has 426 likes and 1 share. Comments from users like Cindy Camunas-Jenkinson and Sarah Dunn are visible.

This screenshot shows a Facebook link share from CHOC Children's dated February 20. The text of the post reads: "We had to share Jennifer's touching story about her recent tour of the Bill Holmes Tower. We're proud of our beautiful new facility, technology and amazing staff! We're also proud of the courage of the patients we are privileged to serve!" The link is titled "my touching tour of the new CHOC Children's Hospital tower" and includes a small photo of the hospital building. The post has 90 likes and 4 shares.



FACEBOOK

- ▶ CHOC: Children's Hospital of Orange County
 - Posts related to giving



FACEBOOK

- ▶ Chapman University
 - Planned Giving Office

Admin Panel
Edit Page ▾ Build Audience ▾ Help ▾ Show





Charles C. Chapman Heritage Society

Charles C. Chapman Heritage Society

Community Page about Chapman University

Update Page Info

✓ Liked

The Facebook page for the Charles C. Chapman Heritage Society provides information for people of all ages about estate planning with a focus on positively influencing the lives of others through Chapman University.




387



Map

2010 Baccalaureate address from Clas BACCALAUREATE ADDRESS -- CHAPM

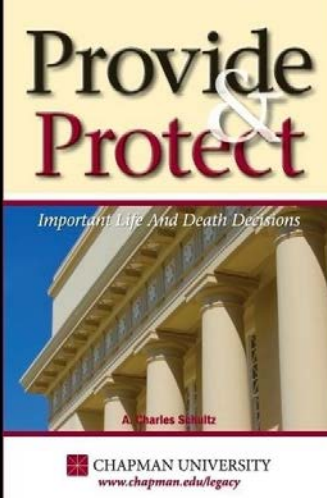
About
Photos
Likes
Notes 1



Charles C. Chapman Heritage Society

Liked · February 10

✕




PROVIDE & PROTECT

Providing and protecting are key principles within any family. Chapman University is pleased to offer our Facebook friends interested in setting up their estate plans a complimentary copy of Provide & Protect. The book will assist you in making critical decisions about your estate, family and legacy. In short, easy-to-understand chapters, it guides you through the important questions and steps you should take now to provide for and protect your spouse, children, grandchildren and other loved ones in the future. If you would like a copy for your personal planning, contact David Moore at (714) 516-4590 or dmoore@chapman.edu. The book is available to anyone with a historic/documentary relationship with Chapman University such as alumni, parents, donors and other friends.

Tag Photo
Add Location
Edit

Like · Comment · Share · Edit

✕




Charles C. Chapman Heritage Society

February 14

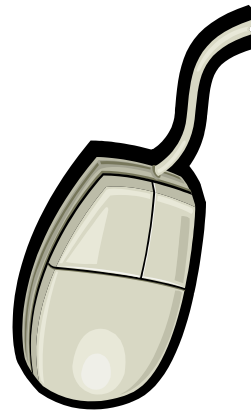
WORKSHOP SERIES

It's Your Money / It's Your Estate

This April and May, Chapman University will once again co-sponsor the incredibly popular "It's Your Money" and "It's Your Estate" workshop series in Newport Beach, Irvine, Dana Point, Orange, Fullerton, Laguna Niguel, Laguna Beach and Brea. There is no cost to attend, and you will not be solicited for business, products or a donation at any time. As hundreds of past participants will tell you, these are exceptional programs to help provide the information you need in order to make critically important decisions about your finances and estate. You are invited to select the dates and locations that best match your interests and schedule. We just ask that you RSVP so we can have materials available for you. Learn more at www.chapman.edu/estate-workshops



Like · Comment · Share



FACEBOOK

- ▶ Chapman University
 - Planned Giving Office

Charles C. Chapman Heritage Society shared a link via Brian Collier.
August 3

Talk about a legacy! Donald R. Booth has been teaching at Chapman University since 1959. In the year of his retirement, please join us as we honor him during Homecoming 2013.



Honoring Dr. Don Booth
www.chapman.edu

Dr. Don Booth is the longest-serving faculty member at Chapman University. He retires this year and we will be holding events to celebrate his career. Please check out this page for upcoming events.

Like · Comment · Share 4 1

Charles C. Chapman Heritage Society shared a link.
June 17 near Orange

It's always nice to see Chapman University receive this type of public recognition...



Chapman University named to annual 'most trusted' list in Orange County survey
blogs.chapman.edu

Chapman University named to annual 'most trusted' list in Orange County

Like · Comment · Share 2

Charles C. Chapman Heritage Society shared a link.
August 22

Have you thought through a plan for if you were to encounter a serious illness?




Personal Planner
Planning with a Serious Illness

If at some point in life you have a serious illness, there are a number of planning options that should be considered. With a serious illness, there are emotional, physical and

Like · Comment · Share

Charles C. Chapman Heritage Society
Liked · June 17



WORDS OF A STUDENT: Ashley Cooper
"Aloha, I want to extend my most sincere thanks to you because there absolutely would be no way for me to attend Chapman without your support. I am at a school where I recognize faces as I walk to class, my professors call me by name, I am academically challenged in courses I love, the campus is beautiful, and, most importantly, I feel encouraged to express my identity. This would never be close to possible without your gracious help, and I cannot begin to thank you for this unbelievable opportunity."


Ashley Cooper '16
Major: Strategic and Corporate Communication
Hometown: Kula, HI

These words of appreciation were volunteered by Ashley Cooper, who just completed her freshman year. To make a difference for students like Ashley, contact David B. Moore at (714) 516-4590 or dmoore@chapman.edu. Without obligating you to a gift, David can help you to understand ways that you can use charitable giving strategies to advance your

Write a comment...

Charles C. Chapman Heritage Society shared a link.
August 26

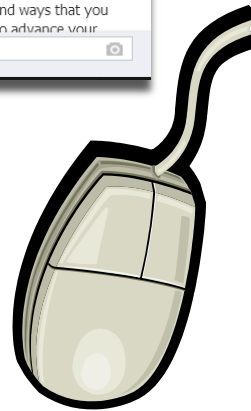
FINANCE NEWS: (1) Struggles Continue for Barnes & Noble, (2) Target's Earnings Miss the Spot, (3) Pandora's Earnings Warn of Trouble Ahead, (4) Treasuries Rise on Weak Home Sales News, and (5) Interest Rates Rise on Tapering News.



Finance News
Struggles Continue for Barnes & Noble

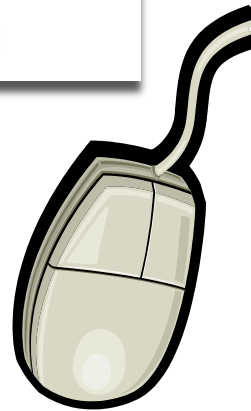
Barnes & Noble, Inc. (BKS) reported its fiscal 2014 first quarter results on Tuesday, August 20. The book retailer's earnings continue to decline as its Nook segment falls further behind rival e-book

Like · Comment · Share



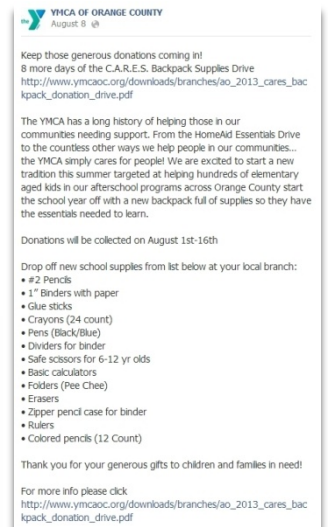
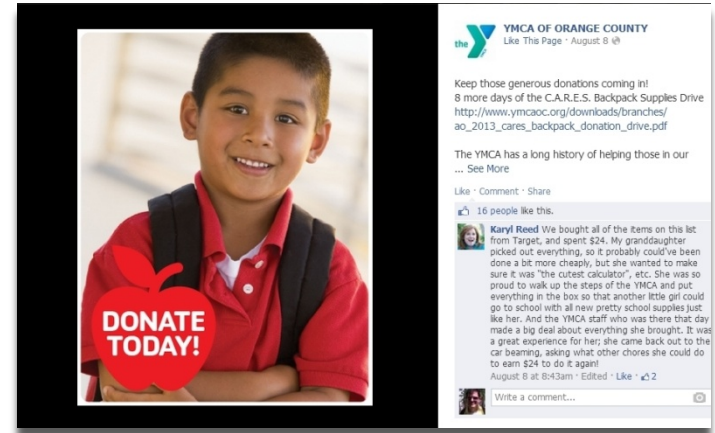
FACEBOOK

- ▶ Chapman University
 - Planned Giving Office



FACEBOOK

- ▶ YMCA of Orange County
 - General site's giving posts



FACEBOOK

- ▶ Cal State Long Beach
 - Planned Giving Office

Community Seminar Series

Easy Strategies... Estate Planning in an Uncertain World

Each seminar begins at 6:00pm
Thursday, February 7
Thursday, February 21
Thursday, February 28

CSULB Foundation Building - Room 304
 California State University, Long Beach
 6300 State University Drive
 Long Beach, CA 90815

\$5 parking in Foundation lot
Free parking available on Palo Verde

RSVP TODAY!
 Online: www.csulb.edu/giftplanning
 (click on "Workshops & Events")
 By phone: (562) 985-5489
 Email: giftplanning@csulb.edu

Open to the public!

Financial professionals from the areas of law, insurance, and finance will present information and answer questions on the following topics:
February 7: Estate & Income Tax Update: Live Over the Fiscal Cliff
February 21: Planning for Retirement: Ways to Not Outlive Your Money
February 28: Estate Planning 101: All You Need to Know about Wills & Trusts, But Were Afraid to Ask

Attend every session or choose your favorite all are at NO COST to you!

Speakers Include:
 DONALD BRIDGES/RODNEY - Independent Professional Fiduciary
 BRENNY Y. CHOI - Attorney at Law, Berth Calderon, LLP
 JESSICA DOMINICK DAVIS - Attorney at Law, Freeman, Freeman and Smithey
 PAUL GORHAM/DAVE - Financial Advisor, Northvestors Mutual
 DELLA FERRARONE - Certified Financial Planner
 SUZANNE LEREWIE - Financial Consultant
 MICHAEL MUEHL - Certified Public Accountant
 JOEL SAMARIN/ROG KAPLAN - Trust Officer, Citicore Business Bank
 LINDA WALLACE - Chartered Life Underwriter & Chartered Financial Consultant

Brought to you by the
 CSU Long Beach
 Office of Gift Planning

f CSULB Legacy Society Home





LEGACY SOCIETY
CSULB

CSULB Legacy Society

27 likes · 6 were here

Like Message

Add A Category

A Tradition of Changing Lives



27



Map



Events

About - Suggest an Edit

CSULB Legacy Society shared a link. July 10

As we bid farewell to President F. King Alexander and welcome Interim President Donald J. Para, we thought it would be nice to reflect on what we've accomplished over the past eight years.



F. King Alexander CSULB Presidency Timeline | Beach Review
www.csulb.edu

Oct. 27, 2005 Murray State University President F. King Alexander is selected to be the sixth president at California

Like · Comment · Share 1

CSULB Legacy Society shared a link. December 12, 2012

Happy Holidays from our 49ers!



LBSU Athletics: 2012 Holiday Greeting

Long Beach State student athletes and staff would like to wish you a happy holiday! Go Beach!

Like · Comment · Share



FACEBOOK

- ▶ Cal State Long Beach
 - Planned Giving Office

 **CSULB Legacy Society** shared a link.
July 10

As we bid farewell to President F. King Alexander and welcome Interim President Donald J. Para, we thought it would be nice to reflect on what we've accomplished over the past eight years.

 **F. King Alexander CSULB Presidency Timeline | Beach Review**
www.csulb.edu

Oct. 27, 2005 Murray State University President F. King Alexander is selected to be the sixth president at California

Like · Comment · Share 1

ESTATE PLANNING SEMINAR

TURN YOUR PROPERTY INTO INCOME
and SAVE ON TAXES

Do you have a vacation home, commercial/investment property or personal residence? Are you interested in selling, but afraid of the taxes or loss of income on investment property? Join us to learn how to use your property to benefit yourself AND your community.

This FREE seminar will give you the information you need to donate property, save taxes, provide you with income for life, and fulfill your charitable intent.

Monday, June 24th at 6:00pm
CSULB Barrett Athletic Administration Center
(next to the Walter Pyramid)

Panelists include:

Brian Y. Chou - Attorney at Law, Barth Calderon, LLP
Jessica Dorman-Davis - Attorney at Law, Freeman, Freeman & Smiley
Greg Ernst - Realtor, Main Street Realtors
Michael Munn - Certified Public Accountant



RSVP TODAY!

Online: www.csulb.edu/giftplanning
(click on "Workshops & Events")
By phone: (562) 985-5489
Email: giftplanning@csulb.edu

Brought to you by the
CSULB Office of Gift Planning

 **CSULB Legacy Society**
Liked · May 22

Join us in June for a FREE seminar on ways to save taxes and increase income from your existing real estate:

Like · Comment · Share

 Write a comment...

People You May Know See All

-  Sarah Magaddino Kuhlman
8 mutual friends
Add Friend
-  Brenda Carver
7 mutual friends
Add Friend
-  Keith Crane
7 mutual friends
Add Friend
-  Mary Helen Beatificato
4 mutual friends
Add Friend

 **CSULB Legacy Society** shared a link.
July 9

Estate Planning for Facebook

 **Estate Planning for Facebook**
csulbgiftplanning.wordpress.com

Did you know you most likely are the owner of "digital assets?" When you hear that term, you may think ... Continue reading >

Like · Comment · Share



FACEBOOK

- ▶ Claremont McKenna College
 - Planned Giving Office

CMC Office of Planned Giving

CLAREMONT MCKENNA COLLEGE

CMC Office of Planned Giving
44 likes · 7 talking about this · 3 were here

Education · Medical & Health · Add A Category
The CMC Office of Planned Giving Facebook page shares interesting and pertinent stories on today's living, taxes and financial and estate planning. For information on planned giving strategies please visit: www.cmcp.org.

About · Suggest an Edit

Photos Likes Map

CMC Office of Planned Giving shared a link.
May 10 near Azusa

Just a reminder that Ray Rotolo and Jim Jacobs from CMC's Office of Planned Giving will be at the annual Money Show at Caesars Palace in Las Vegas. Stop-by their booth in the exhibit hall, mention this Facebook page and claim a special gift!

The MoneyShow Las Vegas - May 13 - 16, 2013
www.moneyshow.com

The MoneyShow Las Vegas joins top investment experts together with self-directed, active investors looking for global investment

Like · Comment · Share

CMC Office of Planned Giving shared a link.
June 4 near Azusa

So here's what Warren Buffett has to say about estate planning - a short but interesting read.

Lessons in estate planning from Warren Buffett
license.icopyright.net

The Berkshire Hathaway boss talks about his plan for his children

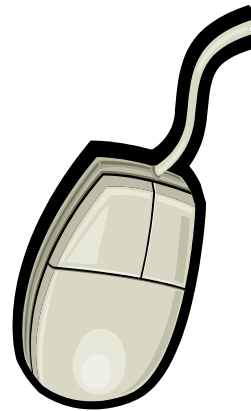
Like · Comment · Share

Take a moment to read this and avoid the estate planning mistakes that James Gandolfini did not!

Estate Planning Lessons From James Gandolfini
money.usnews.com

The Sopranos star left a large estate that's subject to a big tax bill

Unlike · Comment · Share Like 2



FACEBOOK

- ▶ Claremont McKenna College
 - Planned Giving Office

 **CMC Office of Planned Giving** shared a link. July 31

There are some things beyond our control in retirement!



5 retirement variables outside your control
money.msn.com

There are some things about your income and expenses that are impossible to predict with any reliable accuracy. Here's how you can take some of the risk out of life's uncertainties.

Like · Comment · Share

 **CMC Office of Planned Giving** shared a link. August 5

Here are a few good ideas to help get everyone's week off to a good start.



Money Advice From 6 Financial Greats
www.moneytalksnews.com

Looking for a little inspiration? Check out what some of the wisest financial minds have had to say about money and life.

Like · Comment · Share

 **CMC Office of Planned Giving** shared a link. August 6

While the experts recommend against it, the writer suggests that there are times when it's OK to borrow from your retirement savings. But all agree it's nothing to make a regular habit of!



When it's OK to dip into retirement savings
money.msn.com

It's a retirement planning rule – don't borrow from your 401k or IRA. But special circumstances sometimes dictate that you

Like · Comment · Share

 **CMC Office of Planned Giving** shared a link. August 11

If you don't already have one it's never too late to start one!



What Is An Emergency Fund And Why You Need To Have One
thinkrichbefree.com

Emergency fund is simply a fund that you ONLY use in times of emergency. It also serves as a safety net whenever something unexpected

 **CMC Office of Planned Giving** shared a link. August 13



Common Investing Mistakes and How to Overcome Them
moneybulldog.co.uk

Today we have a guest post from a fellow blogger John over @FrugalRules.com! If you're interested in

Like · Comment · Share



FACEBOOK

- ▶ Occidental College
 - Planned Giving Office

The Ben Culley Society of Occidental College shared a link.
October 31, 2012

Most people haven't taken advantage of the incredibly favorable estate and gift tax law expiring in 2012. Between now and December 31, 2012, each person can give away \$5,120,000 without gift or estate tax. Consider taking this opportunity to save on taxes and support Oxy's next 125 years!

Estate Planning isn't Ghoulish and Can Save Millions This Year - Forbes
www.forbes.com

Photo credit: solyanka It's not ghoulish to think about death, especially this year. On Halloween, in mid-November or early December, there's still time to plan.

Like · Comment · Share

The Ben Culley Society of Occidental College shared a link.
February 28

Thinking about estate planning in 2013? Here is a comprehensive guide to assist you with your planning.

The Forbes Guide To Estate Planning: 2013 Edition - Forbes
www.forbes.com

No matter your age and wealth, you need to take some basic steps to protect yourself and your loved ones. This special post, for National Estate Planning Awareness Week, highlights Forbes' best advice on everything from signing a living will to giving away assets before the \$5

Like · Comment · Share

The Ben Culley Society of Occidental College shared a link.
April 8

Do you have an IRA? Consider giving all or part of your distribution to Oxy. The 2013 IRA Charitable Rollover allows you to transfer up to \$100,000 tax-free to Oxy. Learn more about how you can gain maximum benefit from these retirement plans.

owners' ages as of their 2013 birthdays and account balances on Dec. 31, 2012. Here's the math for unmarried individuals and married owners whose spouses are no more than 10 years younger.

Age	Distribution period (years)	2013 RMD as % of balances
70	27.4	3.6%
71	26.5	3.8%
72	25.6	3.9%
73	24.7	4.0%
74	23.8	4.2%
75	22.9	4.4%
80	18.7	5.3%
85	14.8	6.8%
90	11.4	8.8%

Get Those Required Withdrawals Right
online.wsj.com

Millions of Americans know the advantages of putting money into tax-deferred retirement savings, such as 401(k) plans and individual retirement accounts. But what are the details of the rules on required minimum distributions, or RMDs? Here is what you need to know.

Like · Comment · Share

The Ben Culley Society of Occidental College
November 15, 2012

The Ben Culley Society and President's Cabinet Luncheon
(41 photos)

Like · Comment · Share



FACEBOOK

- ▶ KPCC Southern California Public Radio
 - General site

The screenshot shows the top portion of the KPCC Facebook page. At the top is a blue navigation bar with the KPCC logo, a search icon, and navigation links for Home, Friends, and Messages. Below this is a large cover photo of a sunset over a body of water with palm trees in the foreground. The KPCC logo, featuring a stylized orange and blue 'O' with headphones, is overlaid on the bottom left of the cover photo. Below the cover photo, the page name 'KPCC' is displayed with 47,315 likes and 4,124 people talking about it. A 'Like' button and a 'Message' button are visible. At the bottom, there are links for 'About - Suggest an Edit', 'Photos', 'Likes' (with a count of 47,315), 'KPCC Facebook Pages', and 'Twitter'.

This is a screenshot of a Facebook post from KPCC, dated June 3 near Los Angeles. The post text reads: "Help kick off our summer pledge drive to show your love of public radio. Contribute and one of these gifts can be yours! <http://kp.cc/KHZsvn>". Below the text are buttons for 'Like', 'Comment', and 'Share', and a like count of 10.

This is a screenshot of a Facebook post from KPCC, dated March 7. The post text reads: "You + KPCC = a new car. Donate to KPCC and you could win a 2013 Toyota Avalon XLE Touring, courtesy of your Southern California Toyota Dealers Association." Below the text are buttons for 'Like', 'Comment', and 'Share', and a like count of 14.

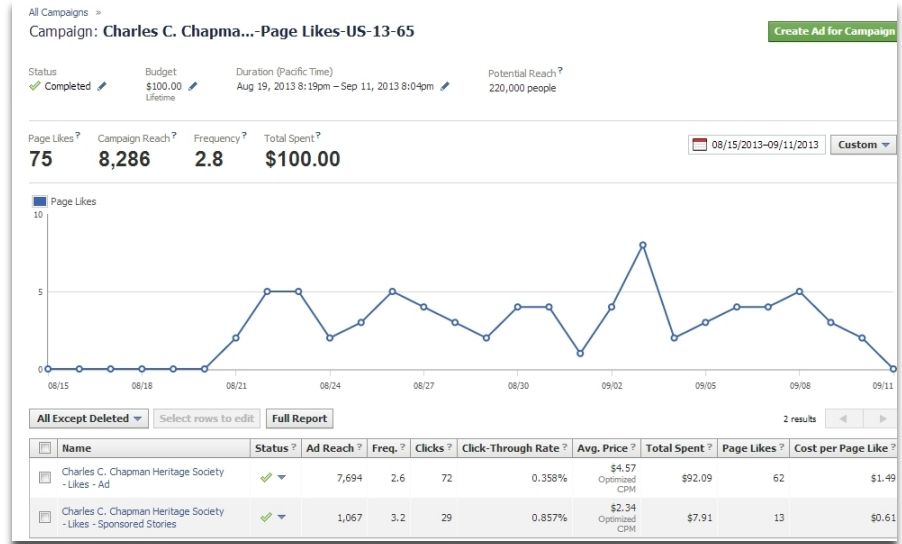
This is a screenshot of a Facebook post from KPCC, dated March 6. The post text reads: "Eric Garcetti joined Take Two to talk about his campaign for Mayor, how he would work to fix the city's budget issues, and the low voter turnout. <http://kp.cc/YRuz2a>". Below the text is a photo of Eric Garcetti at an event, and a caption: "(Photo: Mae Ryan/KPCC)". At the bottom are buttons for 'Like', 'Comment', and 'Share', and a like count of 6.

This is a screenshot of a Facebook post from KPCC, dated March 6. The post text reads: "Paul Tanaka, second in command at the Los Angeles County Sheriff's Department, has announced that he'll be retiring from the department. Tanaka has faced criticism for his handling of L.A. County jails. <http://kp.cc/WU18HT>". Below the text is a photo of Paul Tanaka in a suit, and a caption: "(Photo: Bear Guerra/KPCC)". At the bottom are buttons for 'Like', 'Comment', and 'Share', and a like count of 5.



FACEBOOK

▶ Advertising



Name	Status	Ad Reach	Freq.	Clicks	Click-Through Rate	Avg. Price	Total Spent	Page Likes	Cost per Page Like
Charles C. Chapman Heritage Society - Likes - Ad	Completed	7,694	2.6	72	0.358%	\$4.57 Optimized CPM	\$92.09	62	\$1.49

Ad Preview Edit **Targeting** Edit **Performance**

Charles C. Chapman
 Charles C. Chapman Heritage So...

 Learn how to plan your philanthropic legacy at Chapman University.
 399 people like Charles C. Chapman Heritage Society.

This ad targets 220,000 people:

- who live in the United States
- age exactly 35 and older
- who like #Chapman University School of Law, #United Church of Christ, #Chapman University or #Christian Church (Disciples of Christ)
- who are not already connected to Charles C. Chapman Heritage Society

65 Total Actions?

- 62 Page Likes?
- 3 Page Post Likes?

See full actions report

[View on Right Hand Side](#) · [Create a Similar Ad](#)

Charles C. Chapman Heritage Society - Likes - Sponsored Stories	Completed	1,067	3.2	29	0.857%	\$2.34 Optimized CPM	\$7.91	13	\$0.61
---	-----------	-------	-----	----	--------	----------------------	--------	----	--------

Sponsored Story Preview Edit **Targeting** Edit **Performance**

David Moore likes Charles C. Chapman Heritage Society.

 Like

This sponsored story targets 4,600 users:

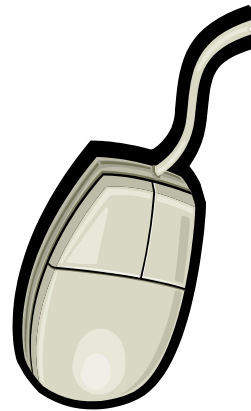
- who live in the United States
- age exactly 35 and older
- who like #Chapman University School of Law, #United Church of Christ, #Chapman University or #Christian Church (Disciples of Christ)
- who are not already connected to Charles C. Chapman Heritage Society
- friends of people who liked the page Charles C. Chapman Heritage Society, friends of people who checked in to the page Charles C. Chapman Heritage Society or whose friends are already connected to Charles C. Chapman Heritage Society

15 Total Actions?

- 13 Page Likes?
- 1 Page Post Likes?
- 1 Page Post Shares?

See full actions report

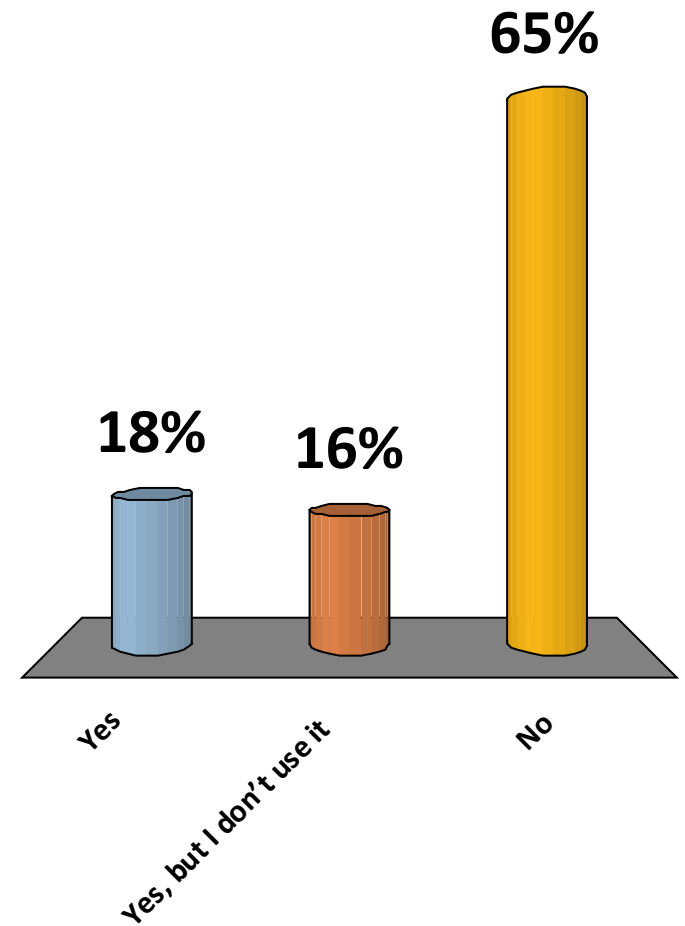
[View on Right Hand Side](#) · [Create a Similar Sponsored Story](#)



TWITTER POLL

Do you have a personal Twitter account?

- A. Yes
- B. Yes, but I don't use it
- C. No

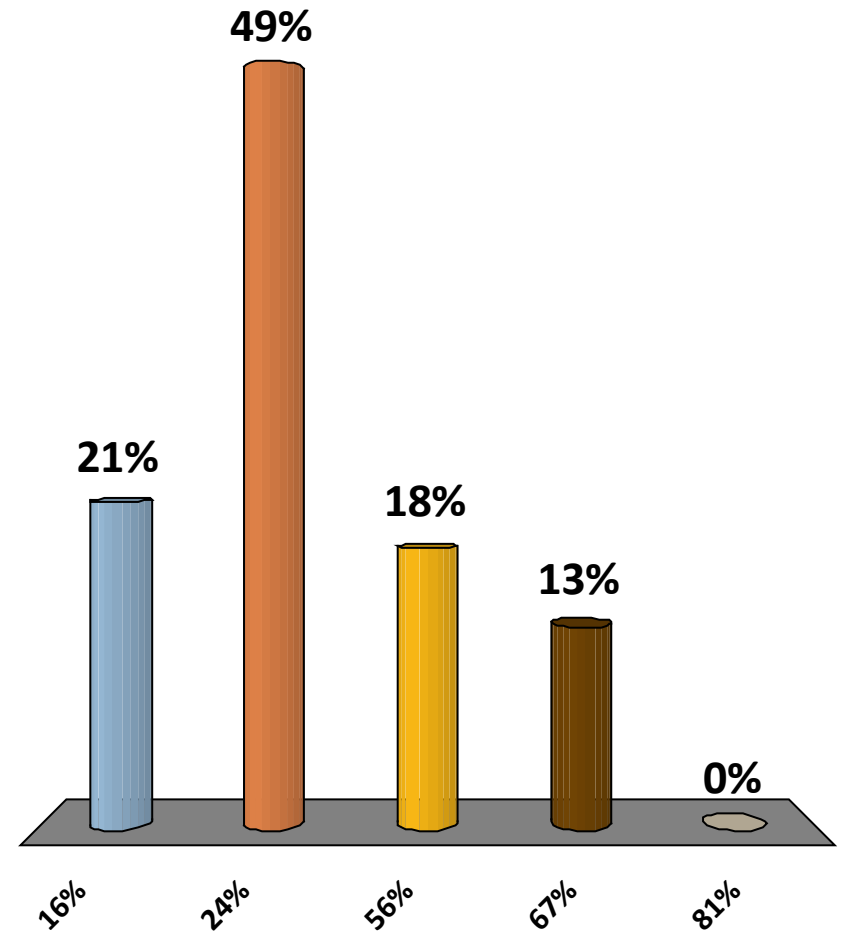


TWITTER POLL

What % of Internet users have a Twitter account?

- ✓ A. 16%
- B. 24%
- C. 56%
- D. 67%
- E. 81%

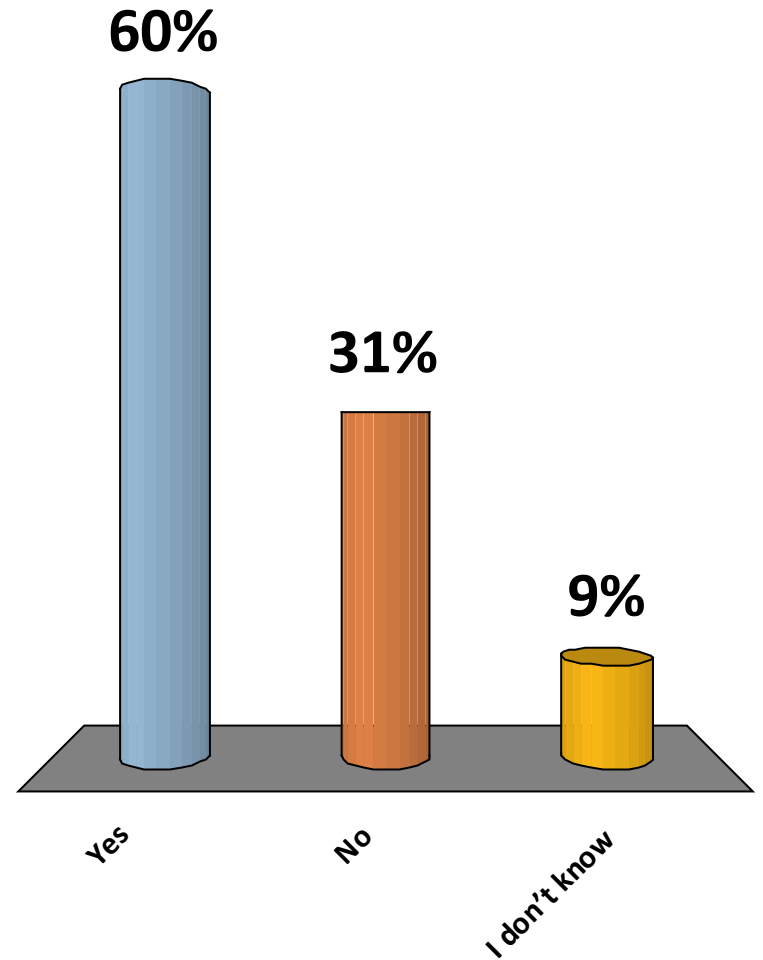
Source: Pew Research Center's Internet & American Life Project Post-Election Survey, Nov. 14–Dec. 09, 2012. Released February 2013.



TWITTER POLL

Does your organization have a Twitter account?

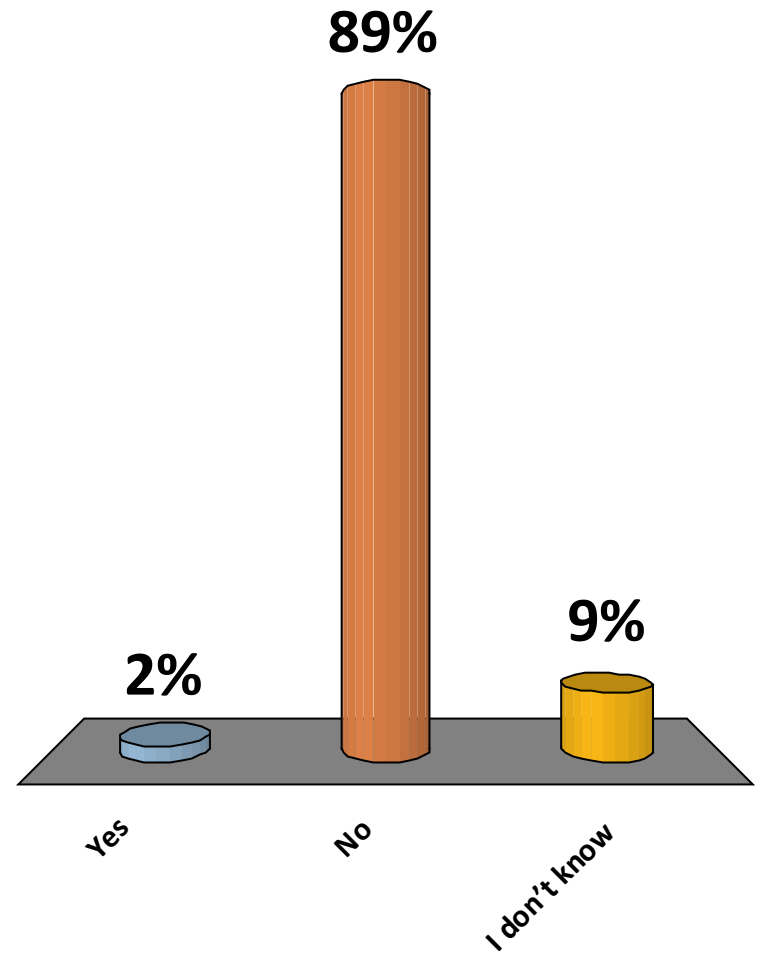
- A. Yes
- B. No
- C. I don't know



TWITTER POLL

Does gift planning info get posted to it?

- A. Yes
- B. No
- C. I don't know



TWITTER

► SoCal Non-profits and fans

 **Linda Theung** @lindaheung 4 Sep
Help support @LACMA by contributing to the STS Cultural Fund, and have the chance to win a seat on the train! bit.ly/STSCulturalFund
Retweeted by LACMA
Expand

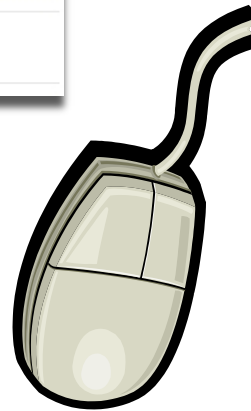
 **KCRW** @kcrw 1 Feb 10
RT @ValerieConfctns: Don't forget to support @KCRW 800-600-5279! @silverlakewine gift cert. with your donation right now!
Expand

 **Salvation Army STL** @SalArmySTL 27 Feb 12
Have questions about #charitable giving w/your #estate? Join in our conversation: facebook.com/pages/Midland-... #giftannuity #estate #salvationarmy
Collapse Reply Retweet Favorite More
1 RETWEET 

 **AnnieClarksonSociety** @AnnieClarkson 3 Sep
Seeking shelter from capital gains? There's a CRUT for that. Email anniesociety@clarkson.edu #clarksonalum forbes.com/sites/ashleaeb...
Hide summary Reply Retweet Favorite More
Charitable Shelter: How CRUTs Cut Capital Gains Tax
Higher federal tax rates give an old technique new appeal. 
2 RETWEETS 1 FAVORITE 

 **Food for the Hungry** @food4thehungry 15 Aug
When it comes to financial security, are we trusting God the right way? FHer Sean Mills explores: go.fh.org/wr #GiftAnnuity
Collapse Reply Retweet Favorite More
1 RETWEET 1 FAVORITE 

 **Steve Hernandez** @BigHern 28 Dec
Just got off the phone with my estate lawyer. Added KPCC to my will. I suggest you do the same.
Collapse Reply Retweet Favorite More
1 FAVORITE 



TWITTER

▶ Allied Professionals

 **The Advise Us Fund** @AdviseUsFund 26 Aug
A CRUT can help you avoid immediate taxation bit.ly/13SgZUr #giving #charity #charitableremaindertrust
Details

 **Sidney Hargro** @SidneyRHargro 16 Mar 12
Charitable Gifts That Give Back - SmartMoney.com
sm.wsj.com/x3yLmC via @SmartMoney #giftannuity #philanthropy
Expand

 **John Bevacqua** @NestedInterest 1 Apr 12
#CharitableGiftAnnuities let you donate to a charity & secure lifetime income bit.ly/yjLtw
Collapse Reply Retweet Favorite More
3:19 PM - 1 Apr 12 · Details

 **The Advise Us Fund** @AdviseUsFund 31 Aug
Charitable Donation Tips for Boomers fxn.ws/1fpN1MY #charitable #giving #babyboomers
Details

 **The Glowacki Group** @GlowackiGroup 6 Nov
Case Study: A Family Business Succession Plan with Zero Estate Tax and a Large Charitable Bequest rrpf.pgdc.com/pgdc/case-stud...
Expand

 **Tax Alerts** @Tax_Alerts 1 Aug
Volunteerism, Charity And Tax Breaks lawdai.ly/12K3hll | by @looperreed #Tax #Law
Collapse Reply Retweet Favorite More
3 RETWEETS 1 FAVORITE 

 **The Advise Us Fund** @AdviseUsFund 29 Aug
A deeper look at charitable remainder unitrusts bit.ly/1bgGD7r #giving #charity #charitableremaindertrust
Details

 **The Glowacki Group** @GlowackiGroup 20 Nov
Charitable parents raise charitable kids reut.rs/QpAy5B #philanthropy
Expand

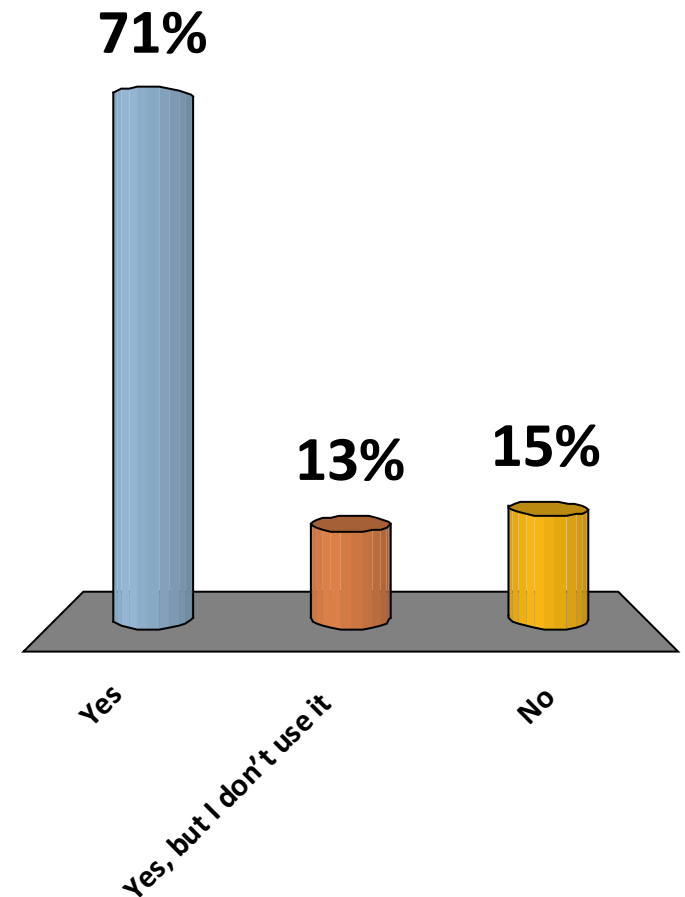
 **Susanne Romo** @SusanneRomo 20 Oct 11
New Post - Charitable Giving with Life Insurance bit.ly/p9WgJe
#life_insurance #estate_planning #Charity
Collapse Reply Retweet Favorite More



LINKEDIN POLL

Do you have a personal LinkedIn account?

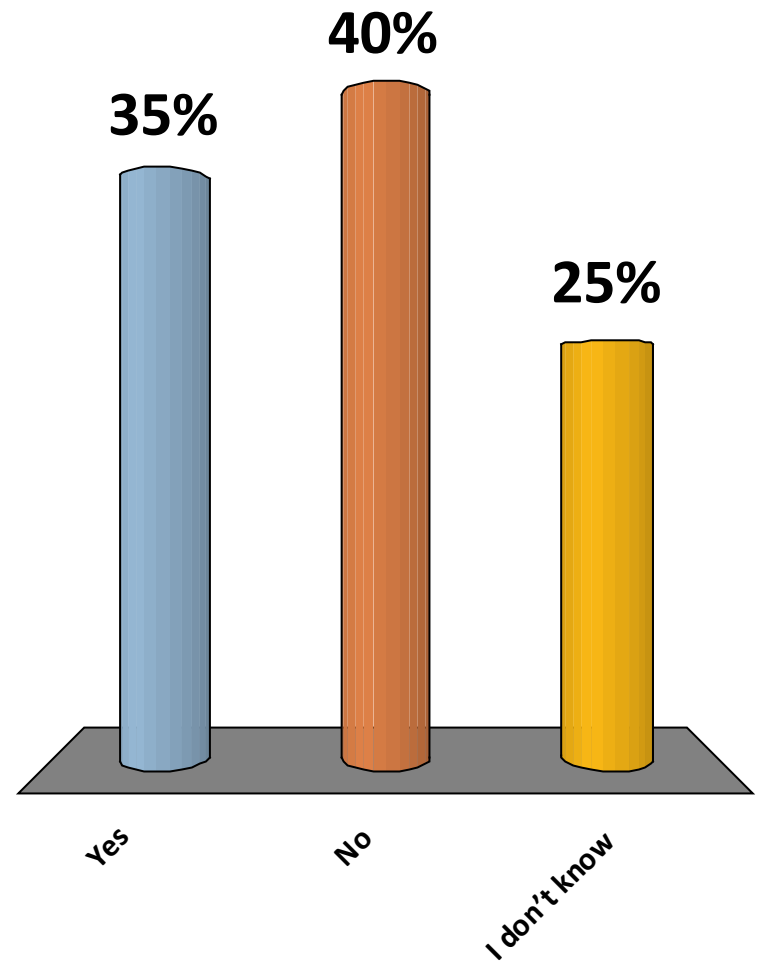
- A. Yes
- B. Yes, but I don't use it
- C. No



LINKEDIN POLL

Does your organization have a LinkedIn account?

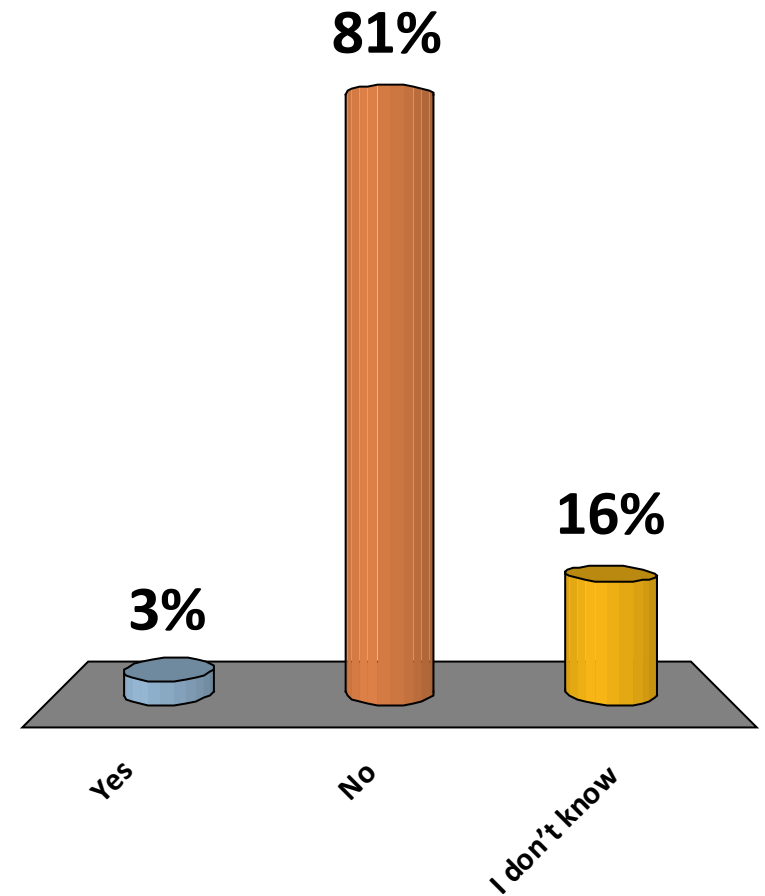
- A. Yes
- B. No
- C. I don't know



LINKEDIN POLL


Does gift planning info get posted to it?

- A. Yes
- B. No
- C. I don't know



LINKEDIN

Linked in [®] What is LinkedIn? Join Today Sign In





CSULB Office of Gift Planning


Such gifts might include bequests, gifts of life insurance, or beneficiary designations from retirement accounts or pensions. The gift may even provide life income to the donor through tools like charitable gift annuities, charitable remainder trusts, or provide enhanced tax advantages to heirs through a charitable lead trust.

[Join Group](#) Or sign up »

People Also Explored

 [CSPG Class of 2013 Networking](#)

 [CSULB CBA Alumni & Friends \(Official\)](#)

 [Kappa Kappa Gamma](#)

About this Group

Created: May 4, 2012
Type: Nonprofit Group
Members: 9

Owner: Allison O.




Website: <http://csulb.edu/giftplanning>

Group Statistics

CHECK OUT INSIGHTFUL STATISTICS ON THIS GROUP

MEMBERS
3,759

[View Group Statistics »](#)

Director	
Manager	
Entry	



PINTEREST

▶ Children's Hospital of Orange County

The screenshot shows the Pinterest profile for CHOC Children's. The profile name is "CHOC Childrens" with a blue bear logo. The bio states: "CHOC Children's is exclusively committed to the health and well being of children through clinical expertise, advocacy, outreach and research." The location is "Orange, CA" and the website is "www.choc.org". The profile has 7 boards, 137 pins, 2 likes, 163 followers, and is following 7 accounts. The boards are categorized into: Stories (14 pins), Tips (79 pins), Our Docs (9 pins), Nutrition (17 pins), High Tech (2 pins), People We <3 (12 pins), and Followers, Fans & Friends (8 pins).

The screenshot shows the "Stories" section of the CHOC Children's Pinterest profile. It features a grid of story cards, each with a photo and a text description. The stories include: a young girl named Jaden Rascon, a nurse named Rebecca Pak, a father-son tradition of donating blood, a 16-year-old girl named Julana, and a 10-year-old boy named Daniel Pickett. Each story card includes a "Follow Board" button and a "14 Pins" count.

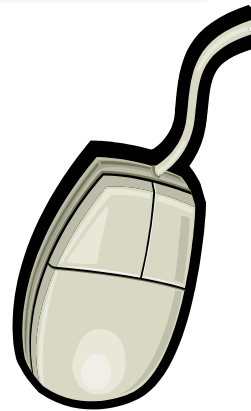


INSTAGRAM

► Charity Water

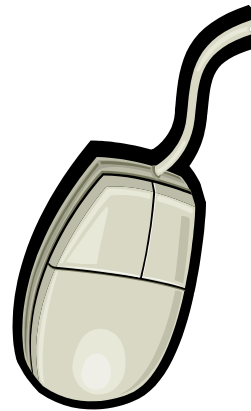
The screenshot shows the Charity Water Instagram profile. At the top, there's a navigation bar with a home icon, the word "Instagram", and a "Log in" button. Below this is a grid of image thumbnails. The main profile header features the Charity Water logo (a yellow water tap icon) and the name "charitywater". The bio reads: "charity: water We're bringing clean and safe drinking water to people in need around the world. <http://www.charitywater.org/september>". To the right of the bio, it shows "667 posts", "148,113 followers", and "1,354 following". Below the bio is a grid of posts from September 2013 and August 2013. At the bottom, there are links for "ABOUT US", "SUPPORT", "BLOG", "PRESS", "API", "JOBS", "PRIVACY", and "TERMS", along with the copyright notice "© 2013 INSTAGRAM".

The screenshot shows a specific Instagram post from the Charity Water account. The post features a large image of a young girl smiling while washing her hands at a public water station. To the right of the image is the post's metadata and comments. The post is from "charitywater" and was posted "2 months ago". The caption reads: "Over 3.6% of the global disease burden can be prevented simply by improving water supply, sanitation and hygiene." Below the caption, it says "shanoas, yulisd, trini3 and 2,186 others like this." There are several comments from users like "splashforward", "cstout37", "brownwatercoffee", "apch2830", "wildcatlinda", "guardianmm", and "elias_assaf". At the bottom of the post, there is a "Leave a comment..." input field and a "Follow" button.



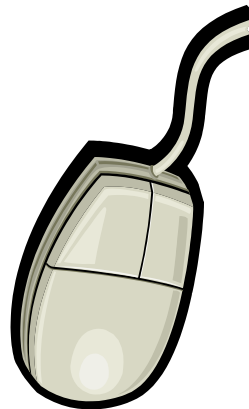
REALITY

- ▶ 80% of Baby Boomers are online
- ▶ Seniors are the fastest growing Facebook demographic
 - According to the November 2012 Pew Research Center study on Facebook usage:
 - 57% of internet users ages 50–64 had a Facebook account
 - 35% of internet users ages 65+ had one



SOME THOUGHTS

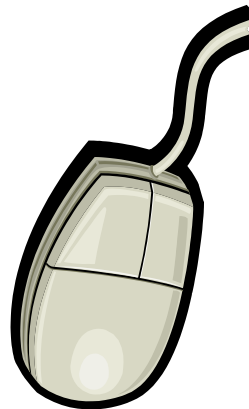
- ▶ Choose a platform that reaches your audience
 - Know your target market
 - Most simply, take advantage of existing pages to regularly plant the seeds of gift planning
- ▶ Timing is important when you post
 - Ask your donors when they use the platform
- ▶ Tell your story
 - A picture says a 1,000 words
 - Get your audience to tell your story
 - Be engaging and helpful
 - Celebrate your donors and your clients



Questions?

- ▶ David B. Moore
 - Director, Planned Giving
 - Chapman University
 - (714) 516-4590
 - dmoore@chapman.edu

 - www.chapman.edu/legacy
 - www.facebook.com/heritagesociety
 - social.chapman.edu



Clickers

- ▶ Turning Technologies
 - <http://www.turningtechnologies.com/>

The screenshot shows the homepage of Turning Technologies. At the top is the company logo and navigation links for solutions, support, about, downloads, and contact sales. A search icon is also present. Below the navigation is a banner for eInstruction with the text 'WELCOME TO THE TURNING TECHNOLOGIES FAMILY!' and a link to read more about a company announcement. The main content area is titled 'ASSESSMENT DELIVERY AND DATA COLLECTION SOLUTIONS'. It features two primary product highlights: 'TURNINGPOINT 5.2.1 RELEASE' which includes a new Mac PowerPoint polling feature, and 'DIGITAL DATA COLLECTION FOR TESTING AND EVALUATIONS' using the Triton Data Collection System. The Triton system is shown as a handheld device with a keypad and a USB dongle. Below these highlights are 'DOWNLOAD NOW' and 'LEARN MORE' buttons. At the bottom, there are social media icons and a 'VIDEOS' section with several video thumbnails and their titles: 'ASSES KNOWLEDGE AND GIBRE ORGANIZEDLY INCLUDE COMPARE TRAINING', 'PROVEN POSITIVE DIRECT ON COMPREHENSION AND RETENTION', 'CRACKING THE CODE OF STUDENT ENGAGEMENT', 'GATHER VALUABLE FEEDBACK WITH TURNINGPOINT AT EVENTS', and 'ENCOURAGE PARTICIPATE AND FACILITATE DISCUSSION'.

