

# Planned Giving Program

The Art of Defining Your Street School Gift



**Street School** has experienced success since 1973. The success is due to many factors. But, none of it would be possible without the various funding methods required to keep the doors open. To ensure the longevity of Street School and build financial resources, Street School has created an endowment.

**Endowment:** [en-dou-muhnt] noun 1.the act of endowing. 2. the property, funds, resources and gift with which an institution is endowed.

**Purpose** of this program is multifaceted . . . .

- 1) To provide a benefit that helps our community supporters provide for their family, meet financial objectives and provide for a charitable organization.
- 2) To increase Street School's endowment.

## Planned Giving Department . . .

Based on the philosophy that planned giving should meet the donor's needs first, Street School feels the best way to serve donors is to create a process that prioritizes family first, followed by financial concerns and then philanthropic objectives. The process to make sure these objectives are met is complimentary – NO FEE – as long as a planned gift to a charity of your choice is made. (Even though we hope Street School is your choice.) The fee is covered by dues paid by the non-profit to their planned giving department – The Advancement Group.

This donor-centric approach enables you to wisely maximize assets, meaningfully transfer them to the next generation, and impact the causes they care about deeply.

**The Advancement Group (TAG)** is an organization used by a long list of non-profits to serve as the planned giving office of their respective organizations. Most non-profits have limited resources and by everyone pooling their money together, TAG provides financial planning knowledge and services to assist donors in pulling information together BEFORE visiting with an attorney. It saves time, legal fees and supports the charity of your choice in the process.

**How the program works?** Simply let Street School know you are interested in learning more about the Planned Giving Program. We will put you in touch with The Advancement Group (TAG). TAG will meet with you in a confidential setting to discuss your situation and generate a customized plan that will provide the information required for an attorney to prepare the planning documents. No financial information, including the amount of your endowment gift to Street School, is shared with Street School. Street School only learns that you are participating in the Planned Giving Program.

## Interested?

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