

Association  
of  
GIFT PLANNING CHAIRS

**March 24, 2023**

# 2023 Association Meeting Agenda

- ❖ Updates
  - Fiscal Year 2023 progress
  - *The Call to Lead* campaign
  
- ❖ Sharing and discussion
  - The financial impact of realized planned gifts
  - Your BTS appeals and outreach



# Fiscal Year 2023 Progress (YTD)

# Gift Planning Results FY23 (YTD) vs. FY22 (YTD)

Total Future Dollars (as of 2/28/23)	2/28/23	2/28/22
<ul style="list-style-type: none"> <li>• Bequest Pledges</li> </ul>	\$25.5 M	\$34 M
<ul style="list-style-type: none"> <li>• Life Income Plans &amp; Additions</li> </ul>	\$326 K	\$139 K
<ul style="list-style-type: none"> <li>• Dartmouth Donor Advised Fund</li> </ul>	\$9 M	\$3.7 M
<b>Total</b>	<b>\$34.8 M</b>	<b>\$37.8 M</b>
Total Realized Dollars (as of 2/28/23)	2/28/23	2/28/22
<ul style="list-style-type: none"> <li>• Realized Bequests &amp; Terminated Life Income Plans</li> </ul>	\$9.5 M	\$13.2 M
<ul style="list-style-type: none"> <li>• Outright Gifts &amp; Outside Trust Receipts</li> </ul>	\$274 K	\$772 K
<b>Total</b>	<b>\$9.7 M</b>	<b>\$13.9 M</b>

# FY23 (YTD) BTS Results

As of 3/16/2023

5,005 BTS members

- 2,275 living
- 2,730 deceased

73 new members so far in FY23

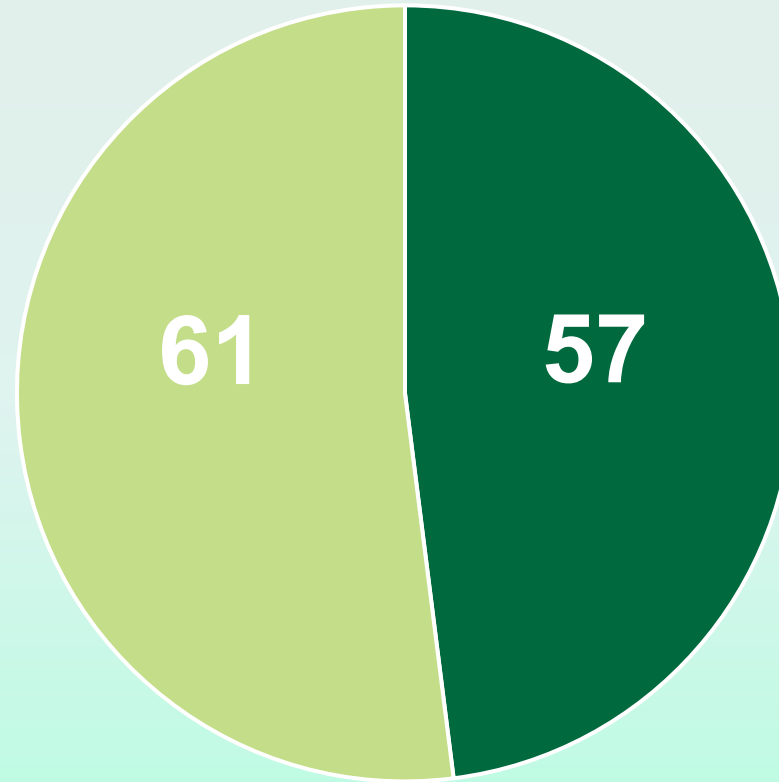
- 19% are referrals from you

## New BTS Members

FY13	110
FY14	147
FY15	221
FY16	181
FY17	182
FY18	189
FY19	195
FY20	171
FY21	98
FY22	145
FY23 (YTD)	73

# The Impact of Your Referrals

118 New BTS Members in Calendar Year 2022



■ GPC Referrals - 48.3%    ■ Other - 51.7%

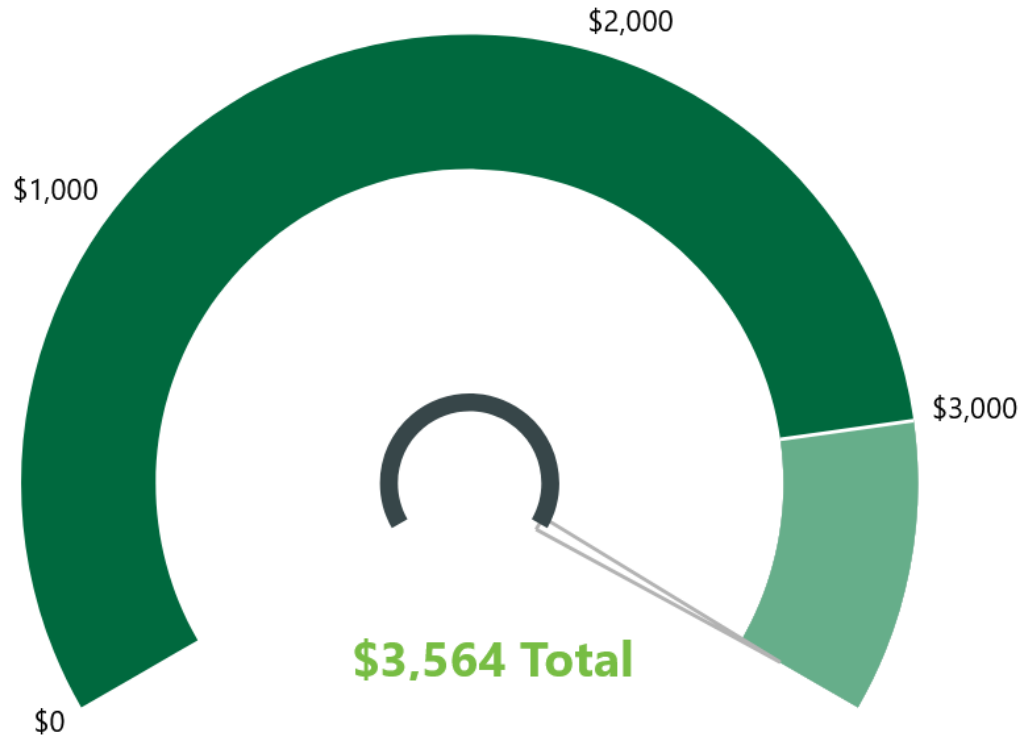
# The Call to Lead



# Campaign Update – Gift Commitments

As of 3/24/2023

## Comprehensive Campaign

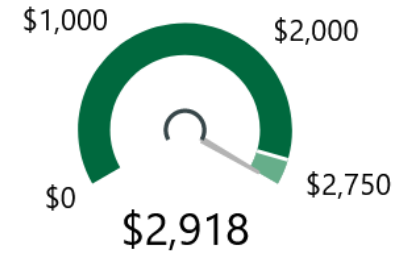


**118.8% of \$3B goal**  
**97,735 donors**

**51,894 alumni donors (56.32% of alumni)**

**41,209 undergraduate alumni donors (59.87% of undergraduate alumni)**

## New Cash and Commitments



## Bequest Expectancies



## Gifts of Other Assets





**We are so very grateful,  
John!**

# Financial Impact

## 9-year Realized vs. 9-year DCF Results

As of June 30, 2022

Fiscal Year	DCF Results	Realized (Bequests + Life Income Plans)	% of Realized vs. DCF Results
FY14	\$53,766,000	\$18,208,459	33.87%
FY15	\$54,619,000	\$13,634,023	24.96%
FY16	\$50,939,000	\$32,170,461	63.15%
FY17	\$47,888,000	\$16,712,425	34.90%
FY18	\$50,548,000	\$12,215,494	24.17%
FY19	\$45,774,000	\$20,955,154	45.78%
FY20	\$45,972,000	\$182,557,560	397.11%
FY21	\$46,038,000	\$28,201,263	61.26%
FY22	\$43,900,000	\$18,131,665	41.30%
<b>TOTAL</b>	<b>\$439,444,000</b>	<b>\$342,786,504</b>	<b>78%</b>

# Sharing & Discussion



# Gift Planning Office



**Susan E. Hanifin**  
*Executive Director*



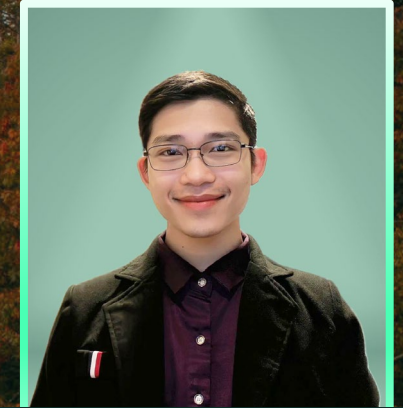
**Lindsey Yates-Grimley**  
*Senior Associate Director*



**Cynthia M. Scott\***  
*Associate Director*



**Hope W. Duncan**  
*Associate Director*



**Rolly D. Balbuena\***  
*Gift Planning Assistant*

**\* Primary points of contact and support for Gift Planning Chairs**