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## acga survey of gift planning now available

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*MSK Client Alert*

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The American Council on Gift Annuities has released the results of a comprehensive national survey on charitable gift planning among U.S. charities. The 40 page report contains a detailed statistical analysis of responses from representatives of charitable organizations to a survey administered by ACGA over a six month period spanning Fall and Winter 2007-2008. A total of 864 responses were received during that time.

This is the fourth national survey conducted by ACGA since 1994. Surveys of charitable organizations in 1994, 1999 and 2004 focused on charitable gift annuities, while the 2007-2008 survey is much broader in scope. Charities were asked about campaign goal setting, planned gift counting and crediting, gift trends, gift administration, marketing and donor recognition, as well as nine types of planned gifts: charitable remainder unitrusts and annuity trusts, pooled income funds, lead trusts, life insurance, retained life estates, bargain sales, and, of course, gift annuities.

There was a concurrent survey of ten professional service providers/administrators. The results of this survey are included in the same report.

The ACGA survey report is available without charge to ACGA sponsors on the ACGA website. While non-sponsors may purchase the report at a modest cost by calling ACGA at 317-269-6271, gift planners and their organizations are encouraged to use this opportunity to become sponsors of ACGA to obtain the survey report and other sponsor benefits. These benefits include access to a library of papers presented at past ACGA conferences as well as reports of other ACGA research projects. ACGA sponsorship is a terrific value.

### **attorneys**

David Wheeler Newman

### **practice areas**

nonprofit organizations