

**An Invitation to Invest:  
Growing Bold and Strategic Donors**



Tracy Gary, Director  
Inspired Legacies  
1722 Haver Street  
Houston, TX 77006  
Phone: 713.527.7671

[www.InspiredLegacies.com](http://www.InspiredLegacies.com)



Anne and Christopher Ellinger, Directors  
Bolder Giving  
21 Linwood St.  
Arlington, MA 02474  
(781) 646-1705 x2

[www.BolderGiving.org](http://www.BolderGiving.org)

## **Inspired Legacies and Bolder Giving** *Invitation for Support*

### Overview

Two donor education initiatives -- Inspired Legacies and Bolder Giving – aim to unleash hundreds of millions of dollars in new giving through the tools they uniquely offer the donor education community. We seek foundation and corporate partners to help these projects grow the organizational capacity to reach their potential. Our goal this next year is to raise at least \$300,000 in grants and sponsorships ranging from \$5,000 - \$100,000.

### What is the need?

The time is ripe for giving. Over a million people in the U.S have assets of \$10M - \$100M. Over the next 20 years trillions of dollars will pass from one generation to the next. Yet most wealthy people give far below their potential: the average giving among people with \$1M+ in annual income is just 4.8% (and the average in the U.S. population is 2-3% of income). Even with the existence of some 2500 donor and legacy education organizations (community foundations, women's funds, and planned giving councils) currently only a tiny fraction of potential givers get the support, inspiration, and education they need to become strategic, engaged, fulfilled givers.

Inspired Legacies and Bolder Giving who serve advisors, nonprofit leaders and donors and their families' directly as well as the donor education field are uniquely poised to propel greater and more strategic giving through their work.

### About Inspired Legacies

Inspired Legacies unleashes giving by facilitating partnerships between donors, advisors, and nonprofit organizations. Last year it reached approximately 15,000 donors and advisors through presentations and individual consultations. The visionary force behind Inspired Legacies is Tracy Gary. Propelled by her personal experience as an inheritor, Tracy has devoted over 30 years promoting strategic philanthropy. She is the founder of influential nonprofits that educate thousands of donors (among them, Resourceful Women, the Women Donors Network, the Women's Funding Network, and Changemakers Foundation). Her workbook, *Inspired Philanthropy*, in its third edition, is used by donors and advisors around the world. She has given thousands of presentations in all fifty states, and is truly a living legacy in her field.

### About Bolder Giving

Bolder Giving inspires and supports people to give at their full potential. A key piece of its work is to spread role models of people giving significantly beyond the norm. In 2007, millions of people were exposed to Bolder Giving's stories of people giving 50% or more of income or assets (featured on CBS and ABC news, the Christian Science Monitor, Worth Magazine, People Magazine and more).

The visionary force behind Bolder Giving is the husband-and-wife team of Anne and Christopher Ellinger. Propelled by their personal experience as inheritors, Anne and Christopher have devoted over 25 years to promoting philanthropy. They are the founders of More Than Money, a national peer network that helped thousands of people align their money and their values. They are also authors of the award-winning book *We Gave Away A Fortune*, the quarterly journal *More than Money*, and the newly released *Bolder Giving Workbook*, and are nationally-known presenters on wealth and philanthropy.

### What is unique about these two organizations?

Most philanthropic advisory services are for-profit: individual consultants and consulting firms that charge fees to work one-on-one with individuals, families and foundations. Or else they are staff of community foundations, who meet at best a few times a year with donors who have accounts at the foundation.

Inspired Legacies and Bolder Giving both work from a different model. They are nonprofit. They hugely amplify their impact by providing tools and inspiration to thousands of advisors, each of whom work with thousands of donors, and by starting and strengthening peer networks of donors. No other organizations are

focused this way, on building the whole field of donor education. Yes, both organizations also coach individuals and families, but Anne, Christopher and Tracy meet people not just as professionals. They are also peers, people who have personally experienced the challenges of wealth and the joys of philanthropy. They accompany people as friends on the lifetime journey of giving, which allows them unique entre, trust and impact. They are committed to building the field and engaged in training many others to play this role.

### Why this collaboration?

Tracy, Anne and Christopher have been colleagues for nearly two decades. They share a base of values plus enormous trust and respect for each other's work. They realized this year that their two organizations fill different niches – yet have strong similarities:

- Both are small, young, national initiatives now ripe for expansion.
- Both serve and strengthen the whole donor education field, not just individual donors.
- Both reach committed, wealthy givers (generally with \$5M+ in assets).
- Both provide a range of services, from working one-on-one with donors and families, to training philanthropic and financial advisors, to writing books and manuals that enhance the donor education field, to speaking in the media.
- Both are founded by hugely respected leaders who have hundreds of relationships with colleagues in the philanthropy field. Both are strengthened by the other's success, as we do a great deal of co-promotion, referral and cross marketing.

Donors interested in supporting one of the organizations would most likely be interested in the other. It seemed a waste of time, effort, and potential to approach funders separately, when together the two organizations provide such an even stronger, confluent and potent funding opportunity.

### What could timely investment accomplish?

Both organizations have produced phenomenal results on modest budgets in their launching years. In 2007 Inspired Legacies's budget was \$375,000 and Bolder Giving's was \$231,000. This year and next they each aim to add at least \$150,000 to these bottom lines. Increased revenues in 2008-2009 would enable:

#### **Infrastructure growth:**

\* Both organizations seek to hire full-time highly experienced Associate Directors (\$80k each) to support the founders in program oversight, human resources, financial management, fundraising, and business development.

\* A part-time Director of Training housed at Inspired Legacies would serve both organizations

#### **Program growth:**

\* To design and disseminate new publications: a Youth Giving Guide produced by Inspired Legacies, and special editions of the Bolder Giving Workbook designed for specific constituencies (e.g. women, entrepreneurs, younger givers) – to reach thousands of donors and advisors.

\* To create a joint “train the trainers” program for fundraisers, financial advisors, and philanthropic advisors that will strengthen their philanthropic work with thousands of donors.

### Become a partner

We hope this overview whets your appetite to learn more. The accompanying packet has sample materials and budgets from both organizations, and our websites (below) each contain a great deal of information. Feel free to fund one organization or both. We would be glad to submit full proposals and Tracy, Anne, and Christopher are available to meet with you in person.