



## ***Integrated Solutions for Growing Non-Profits***

*Founded by:*

**Wayne von Borstel**, CLU, ChFC, CFP, MSFS

*Presented by:*

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## **(first page)**

### **Does your organization share these challenges?**

*How can we increase planned giving for our organization?*

*What's the best way to motivate our current donor base to include our organization in their planned giving?*

*Where can we receive the best training for our Development Staff and Board Executives in assisting potential deferred gift donors?*

*We'd like to have access to professionals we can trust with our potential deferred gift donors. But, who has the education, experience, and integrity to assist our valued benefactors with their gift and legacy planning?*

**The Northwest Planned Giving Initiative** provides integrated solutions for growing non-profit organizations. Working with us will benefit your organization in ways that are meaningful and result-driven. We'll provide:

1. **Motivation for your Donors:** a systematic approach for creating more meaningful conversations about planned giving concepts that include YOUR organization.
2. **Education for your Development Staff:** turnkey tools and training for creating engaging presentations and effective proposals.
3. **Collaboration for Legacy Planning:** scalable, customized solutions ranging from basic to the most complex plans for families of exceptional wealth (\$100+ million).

## **Background: the Vision for the Initiative**

Twice recognized as one of this country's top 100 Financial Planners by Mutual Funds Magazine, NWPGI founder, Wayne von Borstel, manages an independent wealth management firm serving clients throughout the country. After two decades of success helping individual clients, he set out to greatly expand the philanthropic impact he has been having with individuals by widening the focus and vision of his work to include collaborating directly with a select group of charitable organizations.

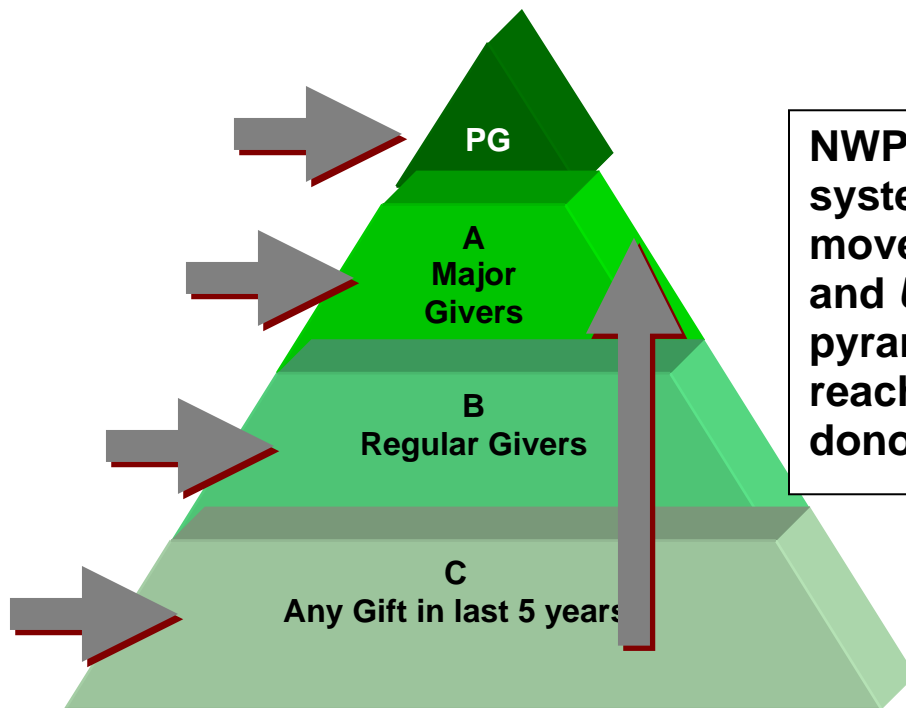
Mr. von Borstel began with an extensive due diligence process, researching the current tools and systems available in the planned giving market place. After completing this thorough search, he successfully identified three stand-alone programs that, when implemented together, form a powerful, integrated planned giving solution.

Thus, the vision for the Northwest Planned Giving Initiative was born. This brochure is a brief attempt to convey the extraordinary synergies that these three elements will bring to philanthropic organizations.

Mr. von Borstel actively partners with non-profit organizations that have an enthusiastic vision for their core mission, an understanding of planned giving's role in achieving it, and a desire to grow their program beyond what they thought was possible. His near-term goal is to be instrumental in helping worthy organizations realize \$1 Billion in current and planned gifts over the next decade.

If your organization could benefit from sharing in this billion-dollar groundswell in gifting opportunities, please join us for a tour to learn how NWPGI can make a positive difference for your organization. We will help you with your overall strategy, provide powerful training and tools for your team, lend support for presentations, and serve as a resource for you and your donors.

# Ideal Solutions for the Planned Giving Process



NWPGI helps you systematically create movement both *INTO* and *UP* the giving pyramid, effectively reaching your entire donor base.

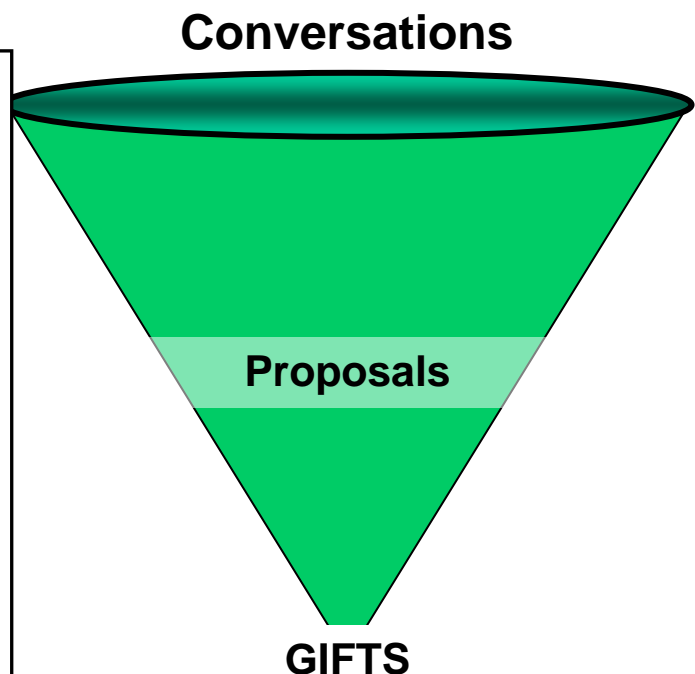
## Focus on the “Controllables” and Results Will Follow

**ALL** Planned Gifts start with a **Conversation**. Conversations lead to Proposals. **Proposals** lead to completed **Gifts**.

Consistently fill your funnel with meaningful **Conversations**.

Use the best tools and resources to develop the Conversations into **Proposals**.

Completed **GIFTS** naturally follow.



## **Attracting, Motivating, and Nurturing Donors: The Donor *Motivation* Program™**

Our first challenge was to find a systematic way to help Development professionals create meaningful conversations with qualified donors. The need for an effective “call to action” tool comes from the notion that ALL planned gifts start with a conversation. Conversations lead to proposals and proposals lead to completed gifts.

Consequently, the first priority is to create productive and meaningful conversations. The Donor Motivation Program (DMP) has an effective 11-year track record. Through DMP, over 10,000 donors have a unique understanding of how their best interest may be enhanced, both financially and philanthropically. Donors are routinely motivated to start the process by simply having a conversation about planned giving opportunities that fit their life-stage and financial circumstances.

In addition to helping you and your staff become proficient in substantive conversations with your donors, we will provide valuable support with strategy and presentations. We will collaborate with you on your overall strategy for raising funds, designing a plan that streamlines with your team’s skills and resources. Presentation planning and implementation are critical to attracting and motivating the eventual one on one conversations with your donors. We’ll help you maximize this important piece of your plan.

Properly implemented, the DMP system Attracts, Motivates and Nurtures potential donors to have that critical conversation which is the first important step on the road to endowment. That conversation may be with your Executive Director, a Board Member, your Director of Development, the donor’s existing trusted advisor or it may even be with a specialist in our organization. Regardless, the foremost goal is to empower your donors with the clarity and confidence to take the action needed to learn about the opportunities and benefits of planned giving, with your organization in mind.

The DMP system is a proven, turnkey, effective process designed to deliver a 50% increase in development productivity for a fraction of the cost of a new development professional. Quite simply, it’s the most cost-effective, time-efficient way to consistently keep your “conversation pipeline” full. And a full pipeline will result in higher fundraising results, allowing your charity to fully realize its mission.

# Development Staff Training & Tools

## Training and Tools

Once we have potential donors talking, what happens if they decide to talk to your Executive Director or your Director of Development? Enter the second piece of our integrated planned giving program: professional training and tools.

The National Charitable Initiative (NCI) is mounting a national capital campaign to raise a minimum of \$100 billion for America's charities by 2016, through the efforts of highly-skilled and experienced wealth-planning professionals—attorneys, CPAs, insurance professionals, and financial planners—to empower thousands of charitable officers to motivate their wealthiest donor families.

We have been selected as an exclusive regional Benefactor with NCI. Through our relationship with NCI, we can deliver to your appropriate staff the professional training and tools they need to have engaging and effective conversations with potential donors. We provide quarterly training modules on the presentation to familiarize development professionals with how to use, talk through and present each Estate Planning concept.

In collaboration with the Institute for Stewardship and Philanthropy at Michigan State University, NCI created the *Adventures in Giving*, a CD-based, animated, professional presentation with instruction on several useful techniques for planned giving. Our training sessions will equip your staff with a comfortable, talking knowledge on each concept, including:

1. Gift of Remainder Interest in a Residence
2. Charitable IRA
3. Wealth Replacement Trust

If a donor poses a question that is beyond the technical ability of your staff, they would involve the donor's estate planner or our team. In either case, your team will have the tools, training, and backup support for furthering the dialogue with donors, ensuring your organization remains top of mind as implementation begins.

NCI, a critical part of our integrated program, is our gift to you. We have invested thousands of dollars in order to secure the training programs and

tools, to deliver them to you as our partners in this initiative. Our goal is to be an effective source of solutions and a resource for training and tools throughout the entire gift process.

## **Resources**

In addition to the “Adventures in Giving” presentation library, partnering with the Northwest Planned Giving Initiative gives you access to many valuable resources that will allow you to reach your goals faster and more effectively.

**Direct Resources:** *Crescendo GiftLaw Pro, GiftLaw Calculator, Washington Hotline, Case of the Week, Private Letter Rulings.* Your organization will have direct access to each of these valuable tools, which allow you to benefit from up-to-the-minute legal trends and other aspects affecting the world of gifting today. They also provide practical technology for assisting donors effectively.

**Collaborative Resources through Us:** *Journal of Multidisciplinary Practice, Crescendo Estate Planned Giving Software.* These are resources to which we have professional access. With our experience and guidance we can utilize these resources to benefit your donors and your organization.

**Encyclopedia of Estate & Wealth Strategies:** 5000+ questions and answers on estate and wealth-strategies planning that your team can use and share with donors.

**Extensive Knowledge Base:** Your organization will have full access to this online resource where you can research information pertinent to your fundraising needs and your donors legacy planning needs via the Internet.

**Fundraising Training for your Staff:** *The Dynamics of Charitable Fundraising.* This training suite allows directors and executives to train junior staff members, complete with online workbooks and PowerPoint presentations.

**Two helpful texts:** *Giving: Philanthropy for Everyone; The Art & Science of Philanthropic Fundraising.* These resource books contain valuable insights into strategically achieving your fundraising goals.

**Continuing Education:** training and professional certification opportunities through the Institute for Stewardship and Philanthropy at Michigan State University.

## Legacy & Gift Planning Expertise

**Scalable Solutions:** Whatever your Staff's knowledge level and expertise, and whatever the level of wealth your donor may have – from average wealth, mid-wealth to “mega” wealth -- our team has the resources to help you deliver world-class ideas and solutions.

**The NWPGI Team:** Your first line of direct support comes from the financial and legacy planning expertise of Wayne von Borstel, CLU, ChFC, CFP, MSFS, Michael Preisz, CFP, CLU, CPA\* and Gretchen Stangier, CFP, CDFA, CSA. Collectively, they represent over 50 years of Financial, Estate, Tax and Business Succession planning upon which you can depend as a direct resource. Each of us has helped hundreds of clients develop individualized Legacy plans that include philanthropic solutions.

**InKnowVision:** As the size and complexity of clients' wealth grows, so too do the corresponding solutions. In fact, there are times when unique opportunities present themselves that require more than just traditional Estate Planning techniques.

In order to provide extraordinary service and solutions to clients of substantial wealth, NWPGI Founder, Wayne von Borstel, joined an elite team of specialists known as InKnowVision. **InKnow Vision LLC** is a national consulting firm that develops and designs management and preservation strategies for individuals and families of exceptional wealth. (\$10million+).

The power of connective wisdom is truly extraordinary. Last year, **InKnow Vision** completed over 40 estate and income tax design plans with total assets in excess of \$1B. The group placed over \$400M in charitable dollars, more than most of the receiving charities raised themselves.

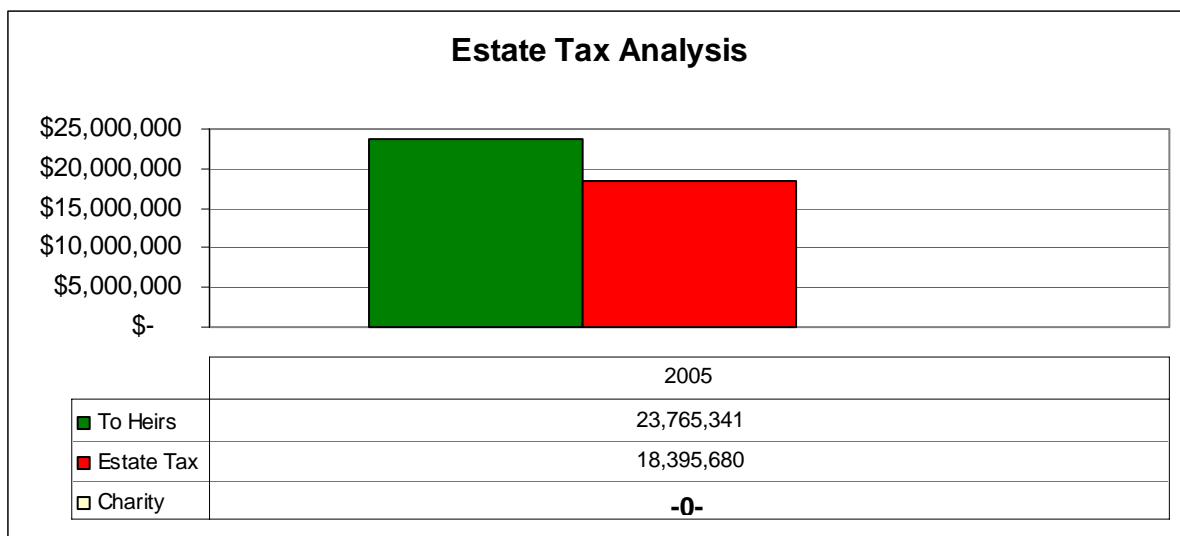
Wayne and the team's designers work with specialized attorneys, CPAs, and insurance professionals throughout the country to insure that each solution is properly implemented in each unique situation. Having an unbiased, team approach to solving the client's estate and income tax challenges creates extraordinary results. We uncover planning opportunities that are often overlooked.

**In 2005, the group placed over \$400 million in charitable dollars - more than most of the receiving charities raised themselves.**

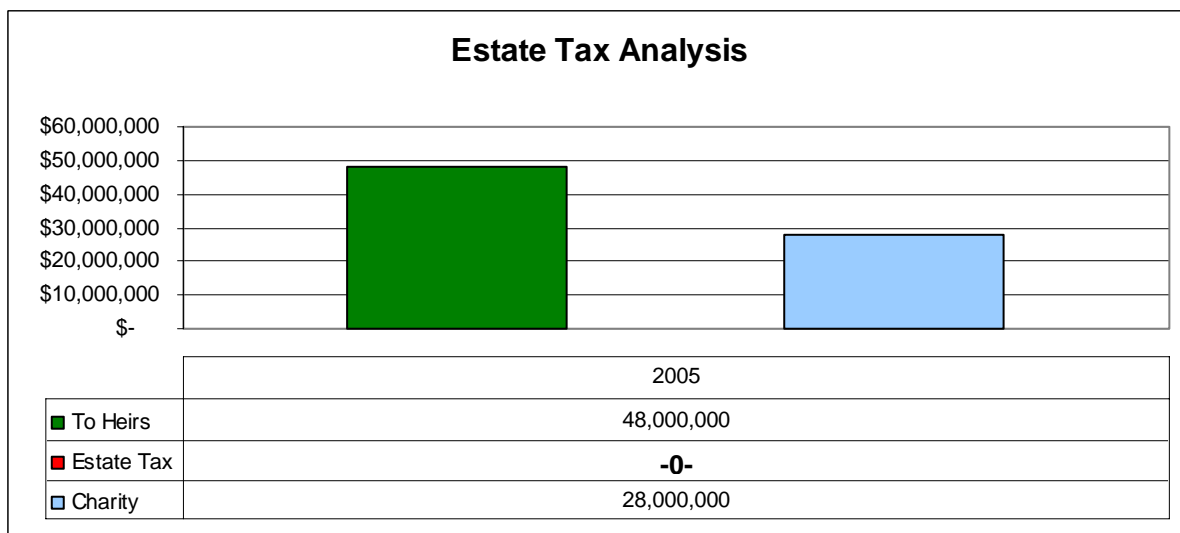
Partnering with NWPGI and InKnowVision gives you access to powerful, proprietary software that integrates multiple strategies with varying assumptions so that we can optimize the desired results for your donors. We take complex issues and make them simple. Our design plans are unique. They are easy to understand for both the client and the advising team.

Below is a brief glimpse at the power of collaboration, taken from an actual client case currently in progress.

**BEFORE: \$0 to Charity**



**AFTER: \$28 Million to Charity**



**Conclusion**

We offer a truly integrated program of planned giving for your charitable organization in three valuable phases: motivating donors to start thinking about what they could accomplish through a planned gift; equipping your staff to have truly engaging conversations with them; and backing up your staff with professional expertise and powerful tools and resources.

## **Why partner with Northwest Planned Giving Initiative**

1. Increased Fundraising allowing your organization to realize its mission and goals to the fullest degree.
2. Motivation for your Donors to include you in their planned giving.
3. Deeper and Stronger Relationships with your Donors ensuring a mutually beneficial partnership for the future.
4. Education for your Development Staff empowering them to engage in significant and effective conversations with Donors.
5. Collaboration for Legacy Planning Solutions for your most valued Donors.
6. Overall Strategy Assistance to develop a comprehensive plan for raising the funds that will allow your organization's important mission to be achieved.

Please call us today to schedule a meeting to discuss your needs and explore how the Northwest Planned Giving Initiative can make a positive and significant difference for your charitable organization.

# Meet the NWPGI Team

**Wayne von Borstel, CLU, ChFC, CFP®, MSFS**

**FOUNDER**

Wayne von Borstel is the President and founder of Oregon Trail Financial Services, Inc. a registered investment advisor company. Since 1985, he's been helping wealthy families and professionals analyze their financial situation and position their assets to live better, worry less and leave more. Wayne's independent wealth management firm, von Borstel & Associates, Inc., serves clients throughout the country from office locations in Portland, The Dalles and Redmond, Oregon.

*Mutual Funds* magazine twice named Wayne one of the Top 100 Financial Planning Champions in the U.S. As an independent wealth coach, he specializes in advising affluent individuals and business owners who seek to carefully preserve, prudently grow and efficiently transfer wealth.

Wayne holds a Master of Science in Financial Services (MSFS) degree from The Graduate School of Financial Services at The American College in addition to the distinguished professional designations of Chartered Life Underwriter (CLU), Chartered Financial Consultant (ChFC), CERTIFIED FINANCIAL PLANNER™ (CFP®) and Graduate Estate Planning Consultant (GEPC).

Wayne founded the Northwest Planned Giving Initiative™, an integrated solutions resource for growing non-profit organizations. He is a Charitable Fellow of the Institute for Stewardship and Philanthropy at Michigan State University. As a Benefactor of the National Charitable Initiative (NCI), he among an elite group of professionals with an extraordinary collaborative vision for redirecting \$100 billion in would-be capital gains and estate tax dollars to America's charities over the next decade. In addition, he's a member of the National Association of Insurance and Financial Advisors, the Portland Estate Planning Council, the International Association for Financial Planning, the National Committee on Planned Giving, the International Association of Advisors in Philanthropy, the Northwest Planned Giving Roundtable and the Providence Foundations Planned Giving Advisory Committee.

Always one to share his expertise, Wayne regularly teaches financial planning courses colleges, continuing education centers and businesses in Oregon and Washington. In addition, he is among a select national group of advisors licensed to deliver the Donor *Motivation* Program™ which helps non-profit organizations systematically create more meaningful conversations about planned giving with their donors.

Wayne and his wife, Marta, reside in The Dalles, Oregon. In his leisure, he enjoys extensive landscaping projects, time spent with his father and traveling.

## **Books** (Co-Authored)

The Wealth Factor

The Invincibility Shield for Investors: *Minimizing Losses, Maximizing Gains and Drafting a More Secure Financial Plan*

## **Articles & Interviews**

Master's Thesis: *The Truth About Dollar Cost Averaging*, Fortune Small Business, Financial Advisor, Mutual Funds, Research, Balance, Registered Rep., Portland Tribune, The Dalles Chronicle, Capital Press, Advisor Today, Bankrate.com.

## **Audio / Video / CD**

“Financial Success Means More Than Just Great Investments”

“Seven Deadly Investor Traps”

**Investment Advisor Representative**

**PROFESSIONAL EXPERIENCE:**

Michael has over two decades of financial consulting and private industry experience, bringing his clients a unique blend of understanding problems and implementing solutions. He started his career with Deloitte, Haskins & Sells, Certified Public Accountants, and obtained his Certified Public Accountant certificate in 1976. Thereafter, for nine years, he worked as a Controller and Chief Financial Officer.

Changing his career direction, Michael has now spent another nineteen years as a Financial Consultant. Since then, he has obtained his Certified Life Underwriter (CLU), Certified Financial Planner (CFP) designations and has registered his company, Preisz Associates, Inc., as an Investment Advisor. His specialty areas include:

- Qualified Retirement Plans
- Non-Qualified Executive Compensation Plans
- Business Succession Planning
- Estate Planning
- Charitable Gifting
- Securities

**PROFESSIONAL ORGANIZATIONS:**

National Association of Securities Dealers  
American Institute of Certified Public Accountants  
Oregon Society of Certified Public Accountants  
National Association of Insurance and Financial Advisors (NAIFA)  
Oregon Association of Insurance and Financial Advisors (ORAIFA)  
Portland Association of Insurance and Financial Advisors  
Million Dollar Round Table (MDRT), Top of the Table level

**CIVIC ORGANIZATIONS:**

Michael has been involved with Boy Scouts of America at both the District and Troop level  
He is also past President of Cedar Mill Little League

**EDUCATION:**

B.S. Cum Laude, Business Administration, Portland State University (1974)

Gretchen specializes in designing simple but effective solutions that help people achieve their financial goals. She assists clients in maximizing current income, minimizing the effects of taxes, enhancing the long-term potential of investments, and protecting their assets.

“The most rewarding part of financial planning,” she says, “is that it focuses on two great benefits: creating the choices you desire and the peace of mind to enjoy them.”

Gretchen holds the professional designations of Certified Financial Planner (CFP®), Certified Divorce Financial Analyst (CDFA), and Certified Senior Advisor (CSA). She qualified for the Million Dollar Round Table in 2000 and 2002 and was awarded the prestigious Agent of the Year Award from the Oregon Association of Insurance and Financial Advisers in 1999 – after just two years in the industry.

Before her transition into financial planning, Gretchen worked with small business owners for five years as a Licensed Tax Consultant. Clients value the experience her “numbers background” brings to planning and her pragmatic approach on investing.

Gretchen's professional affiliations include the Portland Association of Insurance and Financial Advisors, the National Association of Insurance and Financial Advisors (NAIFA); and the Financial Planners Association (FPA).

As a Registered Principal and Investment Advisor Representative of Linsco/Private Ledger, Gretchen offers advice, investments and insurance solutions. Through her affiliation with Oregon Trail Financial Services, Inc., a Registered Investment Advisor, she assists clients and attorneys in addressing the special financial issues of divorce with powerful supportive data that can help achieve equitable settlements.