



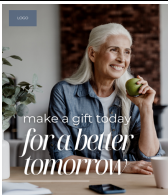






**JANUARY**

DATE	MATERIAL	DETAILS	COPY	MATERIAL
1/7 - 1/13	Social Media Post - New Year's Resolution	Share to social media sites (e.g. Facebook, Instagram, LinkedIn, etc.). Post can be customized with organization's logo and contact information.	Make a New Year's resolution to last a lifetime by resolving to review your estate planning documents! Sticking with resolutions can be tough, but we will provide you with the tools and information you need to move into 2024 with the peace of mind that comes with having a plan in place. To learn more about our complimentary estate planning services, call (918) 491-0079 today!	
1/21 - 1/27	Social Media Post - JAN Legacy	Share to social media sites (e.g. Facebook, Instagram, LinkedIn, etc.). Post can be customized with organization's logo and contact information.	CAPTION: We believe that legacy giving can change your family tree and make an everlasting impact on the future of our organization. Some of the most meaningful things you can leave your family are times shared together and an understanding of the values that made you who you are today.  Call our Legacy Office at 918-491-0079 to learn more!	



**FEBRUARY**

DATE	MATERIAL	DETAILS	COPY	MATERIAL
In February	Ad in newsletter OR Email Attachment - A Story Worth Celebrating	Design can be customized in size, colors, and pictures. IF USED IN EMAIL: Send to DISCOVERx segment. Attach image.		
2/4 - 2/10	Social Media Post - Lasts Longer	Share to social media sites (e.g. Facebook, Instagram, LinkedIn, etc.). Post can be customized with organization's logo and contact information.	CAPTION: Gifts to nonprofit organizations like [ ORGANIZATION NAME ] can be truly transformative and leave a mark on generations to come. To learn how to include us in your planning, contact us today at XXX-XXX-XXXX or by visiting [ www.plannedgiving.com ].	
2/11 - 2/17	Social Media Post - Better Tomorrow	Share to social media sites (e.g. Facebook, Instagram, LinkedIn, etc.). Post can be customized with organization's logo and contact information.	CAPTION: When it comes to generosity, more is caught than taught. Simply put, values are not taught but grasped by seeing the impact. Legacy giving can support you, your family, and the organizations you are most passionate about. Make a brighter future for them by making a gift today. Visit our Legacy Planning site today to explore giving options or to set a time to speak to our Legacy Giving team – www.INSERT ADDRESS	
2/18 - 2/24	Social Media Post - Legacy	Share to social media sites (e.g. Facebook, Instagram, LinkedIn, etc.). Post can be customized with organization's logo and contact information.	CAPTION: Do you want to leave a legacy? A legacy gift is a commitment made during your lifetime, often with no financial commitment today, that supports an organization like ours when you no longer need your assets. To learn how you can give more to heirs and charity, visit our Legacy Planning site today to explore giving options or to set a time to speak to our Legacy Giving team – www.INSERT ADDRESS	

**MARCH**

DATE	MATERIAL	DETAILS	COPY	MATERIAL
3/10 - 3/16	IRA Rollover Postcard	Send to DISCOVERx segment. Customized design for postcard will be provided and changes made as requested. Can be printed as 4x6 or 6x9.	*Customized postcard available upon request.	
3/17 - 3/23	IRA - Email Banner	Send to DISCOVERx segment. Customized header image and copy for the body will be provided. Embed image into email followed by text. (Reference the 'COPY' column.)	There is an easier and more tax efficient way to give through your IRA - a Qualified Charitable Distribution. If you are 70 1/2 or older, you can make a gift of up to \$100k directly to our charity through your IRA. Because you make the gift directly from your IRA, the distribution is not counted in your taxable income. This means you avoid having to recognize the income and help us fulfill our mission! To learn more, visit planned.giving.site or call 918.491.0079!	
3/17 - 3/23	IRA - SM Post	Share to social media sites (e.g. Facebook, Instagram, LinkedIn, etc.). Post can be customized with organization's logo and contact information.	Caption: Help us fulfill our mission and leave your legacy! There's an easier way to give through your IRA. If you are 70 1/2 or older, you can make a gift directly to our charity through your IRA. There are a number of benefits and it's more tax efficient! To learn more, visit planned.giving.site or call 918.491.0079!	

**APRIL**

DATE	MATERIAL	DETAILS	COPY	MATERIAL
In April	Ad in newsletter OR Email -	Design can be customized in size, colors, and pictures. EMAIL: Send to DISCOVERx segment. Customized header image and copy for the body will be provided. Embed image into email followed by text. (Reference the 'COPY' column.)		
4/1 - 4/6	Social Media Post - Hope	Share to social media sites (e.g. Facebook, Instagram, LinkedIn, etc.). Post can be customized with organization's logo and contact information.	CAPTION: You can provide hope to the future of (NAME OF ORGANIZATION) through Legacy giving. This means you have decided to make a planned gift to support our organization and mission. A Legacy gift allows us to carry out our purpose and strengthen our programs and services for the future generation. Learn more about leaving an everlasting legacy by calling our Legacy office at 918-491-0079.	

4/14 - 4/20	Social Media Post - Peace of Mind	Share to social media sites (e.g. Facebook, Instagram, LinkedIn, etc.). Post can be customized with organization's logo and contact information.	<p>CAPTION: No one likes to spend unnecessary money or to give up control of the assets they've spent their lives working to acquire. But that's exactly what happens when we don't set aside time to effectively plan our estates. Estate planning protects those hard-earned assets and provides comfort and peace of mind to you and your loved ones.</p> <p>To learn more about how to get your plan completed, call *AGENCY NAME* today. This complimentary, no obligation service is our way of strengthening our partnership with you.</p>	
4/21 - 4/27	Social Media Post - Your Family	Share to social media sites (e.g. Facebook, Instagram, LinkedIn, etc.). Post can be customized with organization's logo and contact information.	<p>CAPTION: One goal of nearly all parents or grandparents is to teach values to their family. One effective way of teaching the principle of helping others is to model that behavior through the support of charities.</p> <p>Planned giving opportunities can provide benefits for your family &amp; the organizations you support. By making a planned gift &amp; establishing plans for the future, you can demonstrate the importance of caring for family &amp; the true purpose of life while leaving a legacy.</p> <p>To learn more about this type of giving opportunity and many others by calling our legacy office at 918-491-0079!</p>	
<b>MAY</b>				
DATE	MATERIAL	DETAILS	COPY	MATERIAL
5/12 - 5/18	Social Media Post - Lasting Difference	Share to social media sites (e.g. Facebook, Instagram, LinkedIn, etc.). Post can be customized with organization's logo and contact information.	You can make a lasting difference with a gift, today! Learn more about making a legacy gift by calling our Legacy office at (918) 491-0079!	
5/26 - 5/31	Social Media Post - Brighter Futures	Share to social media sites (e.g. Facebook, Instagram, LinkedIn, etc.). Post can be customized with organization's logo and contact information.	Anyone can be a philanthropist and help make the future brighter, regardless of their financial situation. To learn more about being a philanthropist and making a legacy gift, call our Legacy Office today at 918-491-0079!	
<b>JUNE</b>				
DATE	MATERIAL	DETAILS	COPY	MATERIAL
6/9 - 6/15	Social Media Post - Ensure Tomorrow	Share to social media sites (e.g. Facebook, Instagram, LinkedIn, etc.). Post can be customized with organization's logo and contact information.	<p>CAPTION: No matter what season of life you are in, it is never too late to make a plan for the future! Through an estate plan, you can protect the future of your loved ones, assets, and causes you care about!</p> <p>Contact our Legacy office to get started! Call us at XXX-XXX-XXXX or visit our website [planned giving site].</p>	
6/9 - 6/15	Ensure Tomorrow - General Estate Planning Email Banner	Send to DISCOVERx segment. Customized header image and copy for the body will be provided. Embed image into email followed by text. (Reference the 'COPY' column.)	<p>COPY: With summer time here, we become excited and antsy for the summer adventures this season brings. No one is invincible, yet many of us put off the very important matters of determining who will receive our assets, who will be in charge of collecting and distributing those assets, and who will make day-to-day medical decisions in the event of an accident.</p> <p>Planning for a vacation will prompt a frenzy of packing, cleaning, and organizing, and this is a good opportunity to prepare and organize legal documents. There is so much that goes into this process, and AGENCY NAME can teach you simple ways to take the first steps and assist you along the way.</p> <p>No matter what season of life it is, now is the time to take action and rest assured you've provided yourself and your family the best opportunities! Regardless of your estate size or what you feel your financial status may be, let's review just a few of the tools we'll help you learn to use on your planning journey:</p> <ul style="list-style-type: none"> <li>•Will: simple legal document expressing a person's desired distribution of their assets</li> <li>•Trust: fiduciary relationship in which one person (the trustee) is the holder of the title to property (the trust estate or trust corpus), subject to an equitable obligation to keep or use the property for the benefit of another (the beneficiary)</li> <li>•Advanced medical directive (living will): legal document expressing an individual's last wishes regarding life-sustaining treatment</li> <li>•Powers of attorney: legal document that authorizes an agent to act on a person's behalf</li> <li>•Payable upon death designation (p.o.d.): a bank account utilizing a beneficiary designation</li> <li>•Transferable upon death (t.o.d.): an investment account utilizing a beneficiary designation</li> </ul> <p>To learn more about these tools and how to get your plan completed, call *AGENCY NAME* today. This complimentary, no obligation service is our way of strengthening our partnership with you.</p>	
6/23 - 6/29	Social Media Post - Leave A Legacy	Share to social media sites (e.g. Facebook, Instagram, LinkedIn, etc.). Post can be customized with organization's logo and contact information.	<p>CAPTION: Do you want to leave a legacy? A legacy gift is a commitment made during your lifetime, often with no financial commitment today, that supports an organization like ours when you no longer need your assets. To learn how you can give more to heirs</p>	