50th Reunion Program Overview

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I am in my 50th Reunion cycle.
Timeline

Post-45th Reunion – 47th Year
- Wheaton Fund Co-Gift Chairs will build a committee to include a Gift Planning Chair & introduce class goal
- Gift Planning Chair will introduce Founders Society & encourage classmates to plan a comprehensive multi-year commitment during your 50th Reunion
- Class Officers will introduce all the volunteer opportunities leading up to the 50th Reunion

47th Year – Pre-50th Reunion
- Reunion Chair/Vice President will work with Alumnae/i Relations & the Wheaton Fund on mini-reunions focused on participation
- Leadership Ambassadors will work with the Wheaton Fund on mini-reunions to focus leadership giving
- Wheaton Fund Co-Gift Chairs & Gift Planning Chair will leverage these opportunities

50th Reunion
- Class Officers will work the Programming Committee to plan all the reunion activities
- Wheaton Fund Co-Gift Chairs & Gift Planning Chair will announce Class Goal
- Memory Book Chair will work with Alumnae/i Relations on the creation of the memory book

Build a committee
Engagement
Programming
Fundraising

45th Reunion

50th Reunion
I focus on...

Engagement. Fundraising.

Participation. All of the above.
Volunteer Opportunities

Programming Roles:
- Reunion Chair/Vice President
  - Class Treasurer
  - Memory Book Chair
  - Souvenir Committee
  - Hospitality Committee
  - Campus Events Committee

Shared Roles:
- Attendance Committee
- Communications Chair
- Mini-Reunion Committee
- Class Callers

Fundraising Roles:
- Wheaton Fund Co-Gift Chairs & Gift Planning Chair
  - Leadership Ambassador
  - Participation Ambassador
  - Stewardship Ambassador
Engagement

• 1968
  – Boston 39 classmates
  – Washington DC 21 classmates
  – New York City 20 classmates
  – Los Angeles 11 classmates
  – Bridgeport, CT 10 classmates

• 1969
  – Boston 36 classmates
  – New York City 16 classmates
  – Washington DC 11 classmates
  – Chicago 7 classmates
  – San Francisco 6 classmates

• 1970
  – Boston 31 classmates
  – New York City 19 classmates
  – Washington DC 11 classmates
  – Stamford, CT 10 classmates
  – San Francisco 9 classmates

• 1971
  – Washington DC 18 classmates
  – Boston 15 classmates
  – New York City 9 classmates
  – Providence; Stamford, CT & Los Angeles 6 classmates

• 1972
  – Boston 28 classmates
  – Washington DC 16 classmates
  – New York City & Waterbury, CT 14 classmates
  – Philadelphia 9 classmates
  – Los Angeles 8 classmates
The 50th Class Goal counts 9 years – 4 years leading up, reunion year, and pledges made 4 years after.
Class Goal

Total 50th Reunion Gift
(Wheaton Fund + Capital Gifts)

Overall Goal: $3,500,000
Raised to Date: $1,000,000

Wheaton Fund
Including gifts 4 years prior; 50th Reunion year and pledges for future 4 years

50th Year Goal: Overall Goal: $500,000
Raised to Date: $15,000
9 Year Total Goal: $1,500,000
Raised to Date: $675,000

Founders Society Membership
Intended estate gifts

Goal: 20 Members
To Date: 10 Members

Capital Gifts
Brick, mortar, endowment, endowed scholarships & planned/estate gifts

Goal: $2,000,000
Raised to Date: $1,250,000
50th Reunion Class Totals

• 1965 Goal $3,250,000 Total $3,360,942
  – Wheaton Fund: Goal $1,000,000 Total $1,285,194 | 80% participation
  – Capital: Goal $2,250,000 Total $2,075,748
  – Founders Society: Goal 26 Total 18 members
  – Reunion Attendance: 72 classmates

• 1966 Goal $4,500,000 Total $6,429,844
  – Wheaton Fund: Goal $1,250,000 Total $1,101,404 | 67% participation
  – Capital: Goal $3,250,000 Total $5,328,440
  – Founders Society: Goal 15 Total 10 members
  – Reunion Attendance: 62 classmates

• 1967 Goal $3,000,000 Total $3,554,711
  – Wheaton Fund: Goal $1,000,000 Total $1,132,740 | 78% participation
  – Capital: Goal $2,000,000 Total $2,421,971
  – Founders Society: Goal 25 Total 16 members
  – Reunion Attendance: 55 classmates
Wheaton Fund

- Area of Greatest Need
- Arts & Cultural Learning
- Athletics
- Experiential Learning
- Scholarship
- Science, Technology & Library Resources
- Strengthening Ties to Community
- Sustainability
Gift Planning 101

• What is a planned gift?

• Bequest in Will or Trust
  – Percentage or fixed dollar amount
  – Restricted or Unrestricted

• Gift through Life Insurance or Retirement Plan
  – Percentage or fixed dollar amount
  – Restricted or Unrestricted

• Life Income Gift
  – HUH?
Life Income Gifts

• Charitable Gift Annuity

  – Example 1:
    • 67 year old donor gives $10,000 gift
    • 4.8% annuity or $480/year
    • $3,807 charitable deduction

  – Example 2:
    • 72 year old donor gives $10,000 gift
    • 5.4% annuity or $540/year
    • $4,256 charitable deduction
Life Income Gifts

- Deferred Charitable Gift Annuity
  - Example
    - 67 year old donor gives $10,000
    - Defers annuity payments for 5 years
    - 6.3% annuity or $630/year
    - $4,680 charitable deduction
How Do Planned Gifts Count?

• Founders Society Member
  – No age or dollar amount requirement
  – Simple documentation

• Counting for 50th Reunion
  – 65 years or older
  – Bequests – specific dollar amount or estimated percentage
  – Simple documentation
  – Confidential
Questions?