



Cypress College

Foundation



Cypress College

Foundation

Legacy Society Program

Dr. Barbara Dunsheath

NOCCCD Trustee

Raul Alvarez

Retired Executive Director

Howard Kummerman

Executive Director



Cypress College.edu

Cypress College



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The Cypress College Foundation

HUNDREDS OF COMMUNITY "HEROES" HONORED



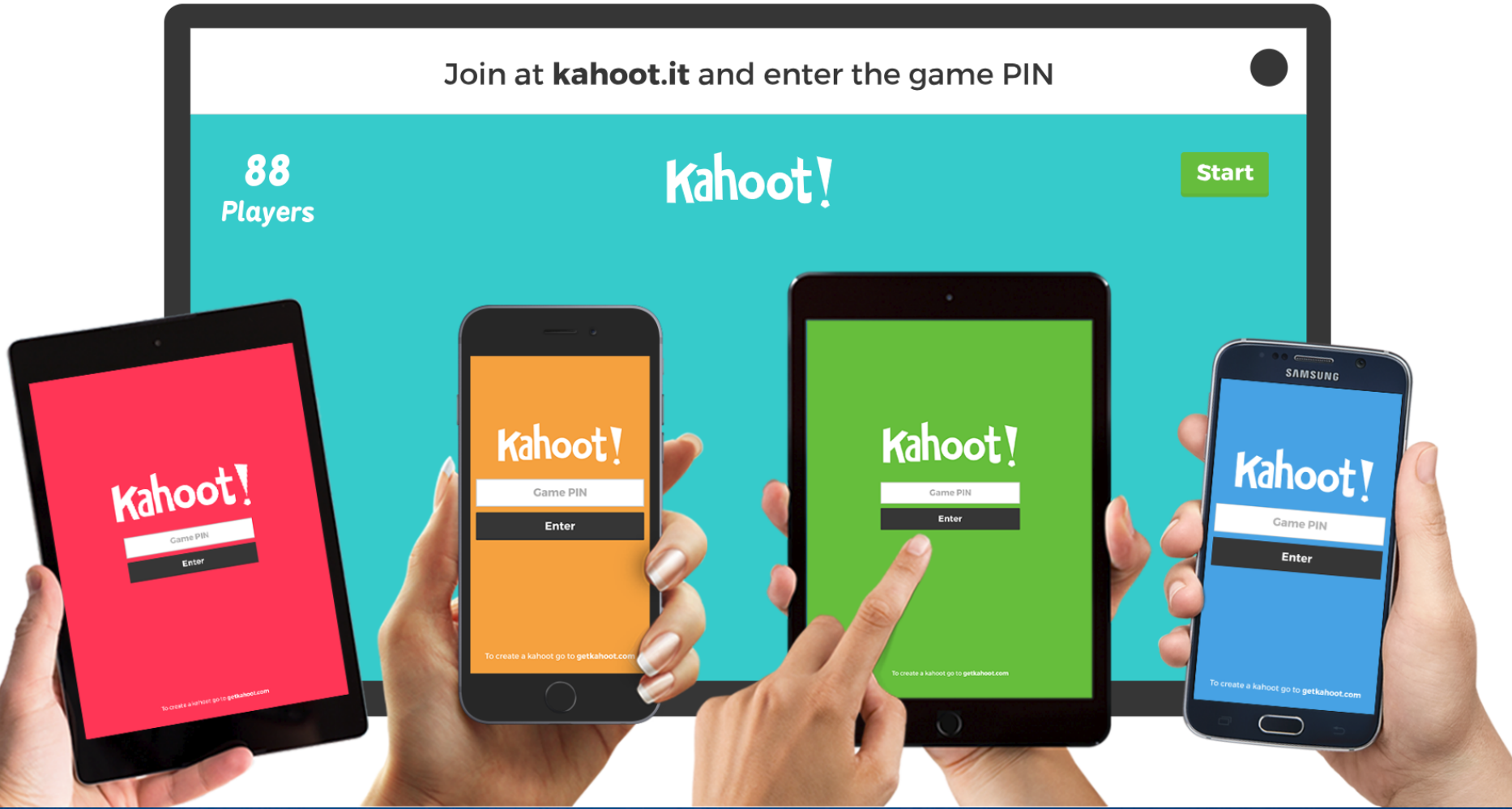
DURING 44 YEARS OF AMERICANA AWARDS



The Cypress College Foundation



Planned Giving Kahoot!



What is The Legacy Society?

THE POWER OF ENDOWMENTS





“The 45 years I spent teaching at Cypress College were deeply meaningful to me. My husband and I are pleased to leave a legacy donation in our will.”

Donna L. Friess, Ph.D., Retired Cypress College Professor



How it began

- District Initiative
- Traditional planned giving program and other models.
- March – 2017 initial conversations
- Information Meeting

Legacy Society

A Legacy Society is simply a group of individuals who express their values by pledging a charitable gift to a nonprofit in the future.

- Costs *nothing* for nonprofit to establish and requires *no* legal paperwork
- Deepens relationships with current donors
- Honors future donors
- Focuses on giving that begins now and leaves a lasting legacy



How it began (contd.)

- June 30, 2018 deadline for Charter Membership
 - 27 Charter Members
 - Offered charter membership as an incentive – A special group of givers.
- Most Charter Members Retirees and CCF Board Members



Legacy Society Prospects

Retirees - Current Employees - Alumni -
Community Supporters - Board of Directors



Charter Members

- Important Early Adopters of the program
- Many more in 18 month period than typical
- Quick Growth
- Low hanging fruit.

CHARTER MEMBERS

Sandie McCarthy (4/19/17) †

Beth Piburn (5/19/17)

Margie Lewis (5/19/17) †

Gail Taylor (5/19/17) †

Bill Garcia (5/19/17)

Kay and Mal Bruce (7/20/17) †

David Shawver (7/20/17)

Mariellen Yarc Lussman and
Paul Lussman (8/23/17)

Pat Ganer (9/13/17) †

James and Cathy Phillips (9/13/17)

Curtis and Jill Scheetz (10/2/17)

Donna Friess (10/24/17)

Diane Henry (10/24/17)

Raul Alvarez and Nan Alvarez-Gray
(12/6/17) †

Barbara Dunsheath and James Finn
(12/6/17)

Walt and Ethel Bowman (12/6/17)

Phil Dykstra (12/6/17)

Pat and Marilyn O'Brien (12/18/17)

Brent and Sherry Hunter (12/21/17) †

Karen Cant (12/21/17)

Joel Gober (1/2/18)

Michael and Jana Kasler (1/3/18)

Robert and Denise Simpson (1/5/18)

Joyce Ricci and Mike Donnelly
(1/9/18)

Nancy Byrnes (1/25/18)

JoAnna and Steven Schilling (2/10/18)

Lydia and Jay Sondhi (3/19/18)

Delight and Robert Sittman (5/25/18)

Lynette Young (6/8/18)

Michael Frey (6/8/18)

Rebecca Gomez (6/13/18)

Pamela Kahn (6/14/18)

Irma Ramos (6/25/18)

Cliff Lester (6/27/18)

Kathleen Reiland (6/28/18)

Cherie Dickey (6/30/18)





“Cypress College is a special place doing amazing things for students. Having been a member of the Charger family, I know the value of our mission in transforming the lives of our students. Being a Legacy donor provides the opportunity to support that mission now and into the future.”

Bob Simpson, Ed.D., *President Emeritus*



Board, College, & District Leadership

- Chancellor and College President's support
- Board of Trustees involvement and support
- Board of Directors Champion



Bob Simpson, JoAnna Schilling, Margie Lewis, Mike Kasler




Donor Cultivation

- Legacy Society Receptions
- Ambassador Program
- Scholarship Ceremonies
- Legacy society contacts and members to help in recruitment of new members.
- College events
- Veterans Service Center Campaign
- Website information and newsletter



Publications

- Legacy Society Brochure
- Legacy Society Bookmark
- Marketing in Americana Program and other event materials




**Cypress College:
#1 Community College
in California***

Cypress College Foundation
Purpose: *To advance the work of
Cypress College*

Mission: *To enhance educational
excellence by providing resources and
promoting public awareness of
Cypress College.*

* "2018 Best Community Colleges"
Niche, Inc.




**LEGACY SOCIETY
Planned Gift Program**

**CYPRESS COLLEGE
FOUNDATION**
Legacy Society Planned Gift Program
9200 Valley View Street
Cypress, CA 90630-5897

For more information, please call
(714) 484-7126
email: foundation@cypresscollege.edu
website: <http://cypresscollegelegacy.org>

**CYPRESS COLLEGE
FOUNDATION**




**LEGACY SOCIETY
PLANNED GIFT PROGRAM**

GIFT GIVING MADE EASY

Legacy Society gifts are endowments, which are invested for future generations. The investment earnings create a source of income to support a scholarship or other College program designated by you, the donor.

There are several ways to make a Legacy Society gift



The Legacy Society supports future generations of students as they expand their horizons through higher education.

YOUR PLANNED GIFT MAKES OUR WORK POSSIBLE

The Legacy Society provides people who understand the transformative value of a college education with the opportunity to leave a lasting legacy at Cypress College.

This gift can be used to celebrate one's life or serve as a memorial tribute to a loved one. Most important, it will support students and programs at the College for generations.

The Legacy Society honors and thanks these generous friends at exclusive events throughout the year.

FUND IT NOW OR OVER TIME


A gift of at least \$10,000 can be funded now, at a future date or paid over a period of a few years.

MAKE AN ESTATE PROVISION


A Legacy Society gift may be made through a will, trust, annuity, insurance policy, Required Minimum Distribution (RMD), pledge or by an outright gift of cash, real estate or stocks. Most of these vehicles provide a significant tax advantage.

ESTABLISH A SCHOLARSHIP OR SUPPORT A PROGRAM

By making a Legacy Society gift to the Cypress College Foundation, you create an ongoing source of income to fund a scholarship or other College program of your choosing for generations to come.



The Cypress College pond and Library/Learning Resource Center are favorite destinations on campus.



Commencement represents the culmination of our work.



Legacy Society Website

HOME > PLANNED GIVING

Planned Giving

One charitable gift, a lifetime of benefits



- Your gift will help Cypress College Foundation fulfill its mission
- You will enjoy a wide variety of tax benefits
- You will give back to the causes that mean the most to you



Planned Giving Menu

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Growth Plan

- Next level prospects
- New retirees
- Learning moment
 $12 \times 12 = 50$



What's Next?

- Follow-up plan for the vehicle of their gift
- Identify prospects with common interests
- Category for business or corporations
- Receptions for prospects
- Increase Minimum Gift
- General Endowment purposes
- Work the Database of Prospects
- Focus on students



Questions?

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