

BIDWELL ADVISORS

Increasing the Quantity and Quality of Real Estate Gifts to Your Organization

An increasing number of non-profit organizations are successfully attracting substantial gifts of real estate in various forms: outright gifts, charitable remainder trusts, charitable gift annuities, retained life estates, bargain sales. In a recent survey of New England non-profit organizations, 12% of respondents indicated that their annual real estate gifts accounted for 6% or more of total gifts. (Four percent of respondents reported real estate gifts accounting for over 20% of giving to their organizations.) Of the organizations reporting smaller levels of real estate gift activity, most indicated a desire to take greater advantage of the enormous intergenerational transfer of real estate wealth taking place, but weren't sure how to move forward.

Bidwell Advisors can help.

Initial meeting

Following a review of various organizational materials, an initial meeting will cover these topics:

- Discussion of existing gift policies and procedures regarding real estate gifts
- Review of recent real estate gift activity, including completed and uncompleted gifts
- Discussion of recent real estate gift marketing approaches and materials
- Review of peer institution approaches to real estate gifts, and success levels
- Discussion of staff and advisor capacity for handling real estate gifts

Assessment and recommendations

In a followup meeting (and/or in a followup written report) Bidwell Advisors will provide:

- Assessment of the organization's potential to attract real estate gifts
- Recommended approaches to revising and improving gift acceptance policies and procedures pertaining to real estate gifts
- Outline of recommended training for development staff, finance staff, development committee of Board of Trustees, and/or key advisors, as appropriate
- Suggested marketing approaches
- Recommended approach to investigating potential gift properties and coordinating due diligence
- Recommended procedures for managing the disposition of gift properties

Fees

Ranging from \$2000 to \$4500.

Additional services

Bidwell Advisors can provide these additional services related to real estate gifts:

- Facilitating discussions involving development staff and finance staff aimed at crafting appropriate policy and procedures for real estate gifts
- Coordinating training sessions on the real estate wealth transfer, review of case studies, recognizing and discussing real estate gift opportunities, marketing approaches, etc.
- Assistance in developing specific marketing approaches and regarding an organization's interest in real estate gifts
- Working with development staff, donors and their advisors to find and structure the most appropriate real estate gift vehicle
- Helping the donee organization and the donor prospect evaluate the bottom line financial impacts of a potential real estate gift
- Coordinating the due diligence procedures (environmental assessment, title investigation, market analysis, etc.) necessary to review potential gift properties
- Helping manage the real estate gift disposition process

Representative Clients

Educational Institutions

- Tufts University
- Vassar College
- Northfield Mount Hermon School
- Amherst College
- Wellesley College
- Smith College
- School for International Training/World Learning
- Springfield Technical Community College

Other Non-Profits

- Dana Farber Cancer Institute
- The Boston Foundation
- Trust for Public Land
- Sudbury Valley Trustees
- Monadnock Conservancy
- American Farmland Trust
- Berkshire Taconic Community Foundation
- New Hampshire Charitable Foundation
- Cooley Dickinson Hospital

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