

Legacy Award for Planned Giving Nomination Guidelines

Award Description: Legacy Award for Planned Giving - Recognizes an individual donor/philanthropist who has made a significant contribution to one or more local nonprofits using a planned gift. A planned gift is any major gift, made in lifetime or at death as part of a donor's overall financial and/or estate planning. These include gifts of equity, life insurance, real estate, personal property, or cash. This award is presented in partnership with the Anne Arundel Estate Planning Council.

Nomination Process:

- ✦ Individuals may not nominate themselves. (This award may be presented as a posthumous award)
- ✦ Nominees will receive a recognition letter from CFAAC upon receipt of the nomination form. The letter will include information on the nomination and selection process.
- ✦ A selection committee of past recipients, which include philanthropists, volunteers, local nonprofit, business, and community leaders will review all nominations and select the awardee.
- ✦ Following the selection, and prior to the public announcement, nominees will receive a letter notifying them of the results.

Nomination Narrative: Provide a written statement that includes specific information illustrating how the individual's planned gift has/or will have transformational impact on a nonprofit in Anne Arundel County. Include evidence and clear examples of what makes your nominee so exceptional.

Nominations should be limited to 500 words and include no more than three supporting documents.

Start with a clear, direct, and specific statement of why the nominee deserves recognition. Include enough information for the selection committee to become familiar with the nominee's commitment to philanthropy. List the most important information in the first few sentences and then elaborate, as necessary.

Provide specific examples that address the award description and elaborate on why the nominee's accomplishments are worthy of the award. Examples should include the activities and qualities that make this person outstanding, and that are clearly relevant to the Legacy Award for Planned Giving description.

- WHAT were/or will be the results and/or impact?
 - What will the nominee's efforts accomplish?
 - Are there specific benefits that have/or will have derived from those efforts?

Describe how others regard the nominee. Consider mentioning major awards and/or the nominee's other education, community, etc. efforts.

Be thorough including information about how the planned gift has/or will have transformational impact on a nonprofit in Anne Arundel County This will enable the selection committee to fully understand the nominee's philanthropic commitment to the organization. The best way to ensure that you have included everything is by asking your nominee, or their family for input!

How to Write a Winning Nomination

- Share the big picture – collaborate with other individuals and organizations to tell your nominee's story.
- Determine who can write the best letters of support.
- Talk with your nominee or their family and friends. Collect as much information as possible.

2021 Legacy Award for Planned Giving

Nominee:

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone Number: _____ Email: _____

Nomination Submitted by:

Contact Name: _____ Title: _____

Nonprofit/Organization (if applicable): _____

Address: _____

City: _____ State: _____ Zip: _____

Phone Number: _____ Email: _____

Deadline for entries is Friday, July 23, 2021.

Assemble your nomination materials, including:

- Nominee's Contact Information
- Nominator's Contact Information
- Name of the Nonprofit(s) the Planned Gift will support
- Nomination Narrative - The written statement is limited to 500 words.
- Letter(s) of Support - Up to three letters of support are welcome in addition to the written statement.
- Nomination must be submitted in its entirety by the deadline to be eligible.

Email completed form, written statement, and supporting documents to Amy Francis at amy@cfaac.org.