



Memorial and Tribute Gifts Programs for Local Councils

Boy Scouts of America

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Scouting America

1325 W. Walnut Hill Lane

Irving, Texas 75015-2079

Phone 972.580.2000

www.scouting.org/financeimpact

MEMORIAL AND TRIBUTE GIFT PROGRAMS FOR LOCAL COUNCILS

Boy Scouts of America

What is it?

It is an organized program for donors to honor, acknowledge, or offer concerns and condolences for a friend, relative, or special business associate.

* A memorial gift offers concerns or sorrow in remembrance of a special person, people, places, or things.
* A tribute gift can be used to recognize or congratulate someone for a personal milestone, achievement, or accomplishment – whether or not it is Scouting related.

**How did it begin?**

Councils have always received unsolicited gifts to honor or memorialize the accomplishments or passing of Scouters or friends of Scouting. As the frequency and size of these gifts increased, it became necessary to formally document and acknowledge these gifts.

Most councils identify these funds as “memorial funds” or “tribute funds.” Some councils even name their funds after local council Scouters who were particularly important and influential in their community.

**Why have a Memorial/Tribute Fund?**

The main purpose of a memorial/tribute fund is to provide donors with congratulatory and memorial opportunities. Many people appreciate – and even expect – such opportunities to express their feelings toward others. Scouting can play an important role in providing these recognition opportunities in its community.

These programs are not primarily intended to raise funds for council purposes or to act as substitutes for annual campaigns and other council fund-raising programs. They are intended to provide a service to others and to let people know that Scouting *cares*. The funds are given for very special reasons; accordingly, they should be used by the council for very special purposes.

**Where does the money go?**

The council’s executive board must approve the use and purpose of memorial and tribute gifts. However, most councils place these gifts in their endowment fund. This way, the gifts will generate perpetual income in the support of the council’s Scouting program. Most donors greatly appreciate the chance to honor or memorialize others in a way that lasts for generations. For this reason and others, all materials for the memorial/tribute program should describe the use and purpose of the gifts.

**What type of occasions?**

There are many occasions for donors to use the memorial/ tribute fund. The list can be as long and creative as the council wants to make it.

Here are few examples:

* Birthdays
* Anniversaries
* Loss of a loved one
* Job promotions
* Graduations
* Marriages
* New business openings
* Public service awards
* Top salespersons
* New residents of a community
* Team or individual sports achievement
* Silver Beaver recognition
* District Award of Merit recognition
* Wood Badge recognition
* Scouting veteran awards
* Eagle Scout achievement
* Unit leader recognitions
* Merit awards
* Special anniversaries of organizations
* Elections to public office
* National week recognition
* FOS recognition
* Planned gift recognitions
* Council board member/leader recognitions
* District committee member/leader recognitions

**How to get started**

It takes a lot of time and effort to effectively organize and promote a memorial/tribute program. The organization and approval of the program should begin with the council planned giving committee. It should then go to the council finance committee, who will share it with the executive board for council approval. Again, that approval will include a decision as to how the council will use the money – typically, to hold the funds in perpetuity in the council’s trust endowment fund and spend only the income from it.

**Materials needed**

In promoting a memorial/tribute fund, the council should provide some form of pre-printed card or form that is easy for donors to complete (such as a booklet with multiple copies of the card o form), and acknowledgement cards for the family of the deceased, the individual being honored, and the donor. Councils may also want special folders to put these receipts and acknowledgements into before sending them out.

**Memorial/Tribute cards**

Depending on whether a gift is for a memorial or tribute, an appropriate and attractive card should be sent to the family of the deceased, or the individual being honored. Another card is then sent by the council to the donor, acknowledging the gift and letting the donor know that the card was sent on their behalf.

**Memorial/Tribute fund booklet**

This small booklet can be an important tool in administering the program.

* The first page usually contains a statement explaining how to make a congratulatory tribute for a living friend, or a memorial gift for a deceased friend or relative.
* The next few pages (often with tear-off portions) allow the donor to identify the honoree, provide appropriate addresses, and determine the type and amount of gift.
* The memorial/tribute booklet should be on high quality paper and may carry a picture of a wreath or bouquet of flowers on the cover. The congratulatory tribute may be printed in brighter ink or on tinted paper.
* The size must be suitable for enclosing in an ordinary envelope to meet postal regulations. Many councils make these forms check-sized – so donors can keep some handy in their checkbooks.

**A Memorial/Tribute fund doesn’t replace “usual” recognitions**

Gifts to the memorial/tribute fund are always significant and greatly appreciated. However, they typically will not replace more customary practices and expressions of appreciation and condolences such as flowers, candy, personal letters, etc. Memorial and tribute gifts are usually expressions of honor and memory that go above and beyond the more usual honors.

However, an increasing number of family and friends now request such gifts in lieu of flowers or other gifts. Thus, it’s important for the council to make it easy and convenient to accommodate donors in these situations.

**Immediate acknowledgement**

It is extremely important to send a receipt to the donor immediately, so they know that the gift was received, and the acknowledgement card sent. If possible, this should be done on the day it is received; if not, as soon afterwards as possible. Lack of a prompt response by the council can create a feeling of anxiety or concern about the efficiency of the council. It sends an implicit message that maybe the council wasn’t as excited about getting the gift as the donor was in *making* the gift. On the other hand, prompt follow-through shows our donors that we care about them and may even lead to additional gifts.

**Promoting the memorial/tribute gift fund**

The real key to the success of the program is how well it is promoted. It is important for Scouters and friends of Scouting to know about the program and remember it when there is an occasion to honor or recognize others.

There are many ways you can publicize the program:

* The council newsletter

This is the best and most widely used source. Include some articles explaining the program and the use of the money. As gifts are received, you may want to also acknowledge the donor and the person being honored. *(Samples of this are included in this booklet.)*

* Memorial/Tribute booklet

Promote this booklet throughout the council and district at roundtables, pow wows, training courses, annual meetings, and other events.

* Annual report

Include information about the memorial/tribute program and an update on the fund in the council’s written annual report. Consider listing donors and honorees as well.

* Council Website

Feature it prominently on your council website. Offer to send people a copy of your memorial/tribute form or give them a way to make the gift online (memorial and tribute gifts to local councils may also be made through http://donations.scouting.org, but you should describe the program on your own Website).

* Announcements

At various council meetings, take the opportunity to have those in charge of the meeting make a brief announcement about the program. Perhaps highlight a recent gift to the program. The more you bring it to people’s attention, the more it will be used.

* Mailings

Look for opportunities to include inserts – or one of the memorial/tribute forms – in some of the many council mailings sent to Scouters during the year.

* Displays

Develop a display that can be placed in the council service center, camps, and other appropriate locations, and consider a table at the entrance to your special events, dinners, etc.

* Funeral Homes/Hospitals

Send samples of all materials to local funeral directors and funeral homes. Provide funeral directors with literature and details on the program. Also, consider asking appropriate staff members of local hospitals if you can place some of the memorial/tribute gift forms and information in the library or visitor hospitality area.

**If you already have a program**

If you already have a program and feel it could be more effective, try the following:

* **Promote it again**

Maybe it has been a while since you have explained the program to your volunteers or board members. New Scouters and board members are always being added and they may not be aware of the program. Be sure and add it to your website, as prominently as possible.

* **List of ideas**

Publish a list of ideas (such as those listed in this booklet) for the many occasions when a tribute or honor could be appropriate. Put it in the council bulletin or distribute it as a single-sheet handout.

**Ultimate benefits**

* Establishing this program will give many people the opportunity to express their appreciation, congratulations, and sorrow to their friends.
* It adds needed funds to the council’s endowment fund or other special fund.
* Its greatest advantage may be that it may cause people to consider including the council in their wills.
* As people learn that it is a permanent memorial or tribute, they are more likely to use it for many occasions.

# THE (COUNCIL) BOY SCOUTS OF AMERICA

# MEMORIAL/TRIBUTE PROGRAM



# THE (COUNCIL) BOY SCOUTS OF AMERICA

# MEMORIAL/TRIBUTE GIFT

A gift to our council’s memorial/tribute fund is a thoughtful way to express respect, gratitude, and sincere affection. Your gift honoring a loved one**,** friend, and others in times of sadness or joy will enrich the lives of the thousands of youths served by our council.

This booklet serves as a convenient reminder of the opportunities you have to make meaningful gifts in memory or honor of others. A completed tribute form, enclosed with your check, should be sent to our council address on the back. Once received by the council, all gifts of $10.00 or more will be acknowledged, and a memorial/tribute card (not including the amount of the donation) will be sent to the person specified.

We hope you will find this memorial/tribute program helpful. Please place this booklet in your desk with your checks and consider its use at appropriate times. Thank you for your interest in and support of our Scouting programs.



# THE (COUNCIL) BOY SCOUTS OF AMERICA

# GIFT IN TRIBUTE

Amount enclosed $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Please place this gift in the memorial/tribute fund: (gifts $10.00 and more)

\_\_\_\_ In memory of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_ In honor of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Please send a tribute card to: Donor Acknowledgement:

Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Address\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

City \_\_\_\_\_\_\_\_\_\_\_ State\_\_\_\_\_\_\_ Zip \_\_\_\_\_\_ City\_\_\_\_\_\_\_\_\_\_\_\_\_ State\_\_\_\_\_\_ Zip\_\_\_\_\_\_\_

Your gift to the Boy Scouts of America is tax deductible.

# COUNCIL NAME BOY SCOUTS OF AMERICA

# REMEMBER SCOUTING IN YOUR ESTATE PLAN

Charitable giving is an important tradition for many people. Making gifts for the benefit of others offers a wonderful way to affirm your values and priorities. Your estate plan provides a unique opportunity to help both the people and organizations important to you. In fact, to consider your assets and direct their future use through estate planning is a comforting and uplifting experience.

Vital to the future of Scouting and our ability to make a significant difference in the lives of young people is to be remembered in the estate plans of our friends and supporters. Such gifts to Scouting assure that this program that has helped so many will help many more.

We invite you to complete and return the survey (see below). Let us know if you have remembered Scouting in your estate plan, or if you would consider doing so. All replies will be treated in the strictest confidence with the understanding that estate-planning decisions may be subject to change.

On behalf of the young people who will know the fun and adventure of Scouting because of your thought-fulness, we extend our sincere thanks!

# A LIVING LEGACY

Consider the following ways to leave a legacy of your own or in memory of a special friend or loved one:

* A gift included in your will or living trust can establish a lasting legacy.
* A gift of excess retirement funds, such as pension plans or Individual Retirement Accounts (IRAs), may allow you to give more, while eliminating taxes that may otherwise largely deplete these assets.
* A gift of life insurance that has fulfilled its original purpose may offer excellent tax benefits. Policies that you purchased to protect a loved one who no longer needs that protection can be an excellent way to make a gift in honor of that person.
* A gift that provides an income can be a tax-effective way to provide you and/or someone else you designate with regular payments for life or other period of time. Check with us or your advisors for more information.

A gift made in any of these ways will serve as your tribute to Scouting or to honor special loved ones.

COUNCIL NAME BOY SCOUTS OF AMERICA

## Confidential

From: Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

City\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ State \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Zip\_\_\_\_\_\_\_\_\_\_

Telephone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

□ I am pleased to inform you that I have included a bequest to the endowment trust fund of the (Council), Boy Scouts of America in my will.

□ I am pleased to inform you that it is my intention to include a bequest to the trust fund of the (Council), Boy Scouts of America in my will.

□ Outright gift of cash or securities

□ Charitable trust

□ Gift of life insurance

□ Gift of personal property:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

□ Gift of real estate

□ Pooled income fund gift

□ A charitable gift annuity

□ Gift of farm or residence

□ While I have not planned a gift to the trust fund of the council, I would appreciate information on the items indicated above.

□ I would appreciate a visit from a qualified BSA representative to discuss estate planning.

In telling you of my intention, I do not intend to create any legal obligation on the part of myself or my estate to the council.

Comments related to the above: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Signature\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\* If you intend to make a bequest at your next will review, photocopy this form and send to your attorney.

### Memo to my Lawyer\*

The (Council), Inc, Boy Scouts of America has a permanent trust fund that I would like to consider for a bequest the next time we have occasion to consider my will. Please put this memo in my will folder as a reminder to us. Thank you very much.

**GIFTS FOR EVERY OCCASION**

In addition to memorials, gifts made in honor of family and friends at times such as Mother’s Day or Father’s Day, the birth of a child or grandchild, or a birthday, wedding, anniversary, or other notable occasion can be gifts of love that show how much you care.

**CONSIDER THESE POSSIBILITIES**

Take a few moments to think about the best ways to make your gifts in memory or honor of others.

Gifts of cash: Gifts of cash and by check are the most popular methods of tribute giving. Such gifts are convenient and can be tax deductible.

Other property: Tribute gifts may also be funded with assets such as stocks, bonds, and mutual funds that have increased in value. You not only receive regular tax savings, but you also entirely avoid the capital gains tax on qualified assets given for charitable use. This extra benefit is one reason a growing number of people choose to make tribute gifts using property rather than cash. Call our endowment office if you have questions about making these types of gifts. (Phone #)

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, Endowment Director**

**Council name, Boy Scouts of America**

**Address**

**City, State, Zip**

**Phone #**

The official registration and financial information of the (council name), BSA may be obtained from the (name of state) department by calling toll free within (state) (phone #). Additional information may be available through [www.guidestar.org](http://www.guidestar.org), or the BSA’s online giving website, [www.donations.scouting.org](http://www.donations.scouting.org) State registration does not imply endorsement.

# Please remember Scouting in your will.

# THANK YOU!





Memorial/Tribute Gift

A gift in honor/memory of

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(name of honoree)

has been received by the (Council), Boy Scouts of America from:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Name of Donor)

(Address, City, State, Zip)

Be assured that this lasting gift will benefit the youth of

America as they strive to achieve their full potential in Scouting as our nation’s future leaders.

Yours in Scouting,

(NAME)

Scout executive



Memorial/Tribute Gift

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

###### **(Name of Donor)**

###### (Address, City, State, Zip)

The (Council name), Boy Scouts of America

gratefully acknowledges your generous

contribution of $\_\_\_\_\_\_\_

for \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Your thoughtful and lasting gift will benefit the youth of America as they strive to achieve their full potential in Scouting as our nation’s future leaders.

Yours in Scouting,

(NAME)

Scout executive