

Hopkins Planner

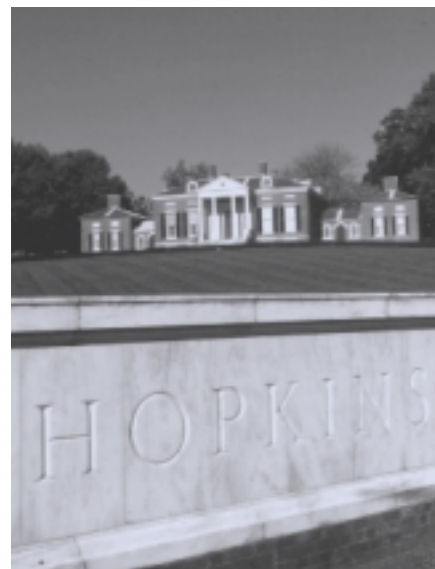
Planned Giving Fiscal Year 2001

Life Income Gifts

• Charitable gift annuities	\$4,350,614 (51)
• Charitable remainder unitrusts	\$3,890,197 (32)
• Charitable remainder annuity trusts	\$175,796 (1)
• Pooled income funds0
Total Life Income Gifts	\$8,416,607 (84)
Charitable Lead Trusts	\$433,963 (1)
Estate/Bequest Distributions	\$25,889,482 (176)
Life Insurance	\$661,663 (30)
Outright Gifts	\$305,319 (8)
Private Equity Partnerships	\$10 (10)
Bequest Intentions	\$2,786,250 (26)
Total Gifts and Intentions	\$38,493,294 (335)

Planned Giving Fiscal Year Report 2001

- **Despite a downturn in the stock market, Johns Hopkins donors completed gifts totaling nearly \$40 million in FY 2001 335 gift distributions. This compares to 347 gifts in FY 2000.**
- **There were 82 life-income gifts valued at over \$8.3 million.**
 - **Gift annuities were, once again, the most popular type of life-income gift, with 51 valued at nearly \$4.4 million.**
 - **Unitrusts totaled nearly \$4 million from 31 gifts. There was one charitable remainder annuity trust valued at \$176,000.**
- **Estate distributions accounted for nearly \$26 million from 176 transfers from donor's estates.**
- **Outright gifts assisted by planned giving officers totaled over \$305,000 from eight donors.**
- **Life insurance activity from 30 donors accounted for over \$660,000.**
- **"Bequest intentions" from 26 people wishing recognition for their future bequests to Johns Hopkins were also included. The estimated value of these estate gifts is over \$2.8 million.**
- **Private equity gift partnerships**—Ten entrepreneurial donors notified Johns Hopkins of private equity gift plans that will be completed in the future when their privately held assets become liquid. These gifts are referred to as "private equity gift partnerships" and are used when conventional gift planning does not fit a donor's situation. The future events that trigger the completion of the gift are typically when there is a public sale of the company like at an IPO or when there is a private sale of all or part of the company. The strategy of these gift partnerships and is to create a plan to transfer assets in the future when the illiquid assets become liquid. Since we do not know what the future value of the assets will be, we value each plan at \$1.00.



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