Creating a personal legacy through Planned Giving
The MDA Foundation – Who we are

- Founded in 1998
- MDA Members making charitable contributions to create greater impact than they can alone
- The Foundation uses your donations to provide
  - Grants to organizations educating and caring for Michigan’s most vulnerable; ensuring everyone can receive quality dental care
  - Scholarships to sustain the profession by ensuring the best and brightest are able to receive a quality education
  - Member Assistance Program (MAP)

**Mission Statement**
Improving Dental Health

**Vision Statement**
All Michigan Residents have the opportunity to achieve optimal dental health
The MDA Foundation –
Our impact because of You

• A medium sized charitable organization with $1.5 million in assets
• Given a total of $277,000 in dental, hygiene and assisting scholarships since 1999
• Given a total of $568,000 in education and access to care grants, serving close to 800,000 of Michigan’s most vulnerable since 2005
• Provided $4 million in care to 4,000 patients at four Mission of Mercy programs held around the state in various locations
• The MDA Foundation endowment; having about $260,000 and growing to sustain the organization and the work we do, in perpetuity
The MDA Foundation – Growing our impact

• Over the last three years:
  • We have eliminated high cost, low revenue events
  • Implemented low cost, high revenue events and programs
  • Grown fundraising by 12%
  • Reduced expenses by 9% or what they were in 2013

• The Foundation’s current needs are:
  • Giving donors the ability to create a legacy; make a difference
  • Providing avenues to reach a greater number of donors

• To meet current needs, a Planned Giving Committee was established in 2018
  • Comprised of ten committee members from around the state
  • The Planned Giving Committee is tasked to
    • Educate members and potential donors about the benefits of Planned Giving
    • Identify potential donors
    • Implement effective and efficient ways for donors to participate in the Planned Giving Program
Planned Giving – What is it?

- A contribution arranged in the present and allocated at a future date to benefit future generations
- Most commonly granted upon the bequest of a donor
- A wonderful and potentially tax beneficial way to support the MDA Foundation while leaving a personal legacy
- Flexibility to choose if/when recognition is to take place
- Ability to choose how your gift can be used as long as it fits with the organization’s mission
- The MDA Foundation will honor your wishes and legacy
Planned Giving

Donors -

• People who want to help make a difference in the world
  • A local dentist creating an endowment in his will to help Michigan’s most vulnerable
  • An university faculty member using her DAF to create a scholarship so future generations have access to education
  • Grateful patients using life insurance to ensure the work of a non-profit continues in perpetuity
• Anyone wishing to make a significant gift to support an organization’s mission while building a more secure future for themselves and their loved ones
Planned Giving is Within Reach

YOU CAN MAKE A LEGACY GIFT

You don’t have to have extraordinary wealth to make a planned gift. Even a small amount can have a big impact over time.

Some people think they must choose between leaving a gift to their family or charity. You can do both! Many planned gifts actually save your family money.

It’s Easy. A simple designation can bring incredible support.
MDA Foundation Legacy Society – What is it?

• Created to honor those who have chosen to leave a planned gift for the MDA Foundation’s future

• Legacy Society members are recognized at the highest levels
  • Should the donor so choose

• Benefits of joining the Legacy Society include:
  • Annual Recognition Event
  • Commemorative plaque
  • Recognition in our annual report/newsletter
  • Recognition on-site at MDA building
  • Knowledge & comfort that the work of the MDA Foundation will represent you and the profession of dentistry during and after your lifetime
Making a Planned Gift – Easier than you think*

- **Remember the MDA Foundation with a gift in your will or trust**
  - Designate the MDA Foundation as a beneficiary
  - Leave a percentage/specific amount

- **Donor Advised Fund (DAF)**
  - This is a vehicle established at a public charity
  - Make an irrevocable charitable contribution & receive an immediate tax deduction
  - Investments in DAF accounts grow tax free
  - Designate the MDA Foundation to receive grants

- **Retirement Plans**
  - Designate the MDA Foundation to receive a charitable gift from a retirement account
  - Retirement plan giving vehicles include
    - IRAs
    - 401K
    - 403b
    - Pensions

- **Life Insurance**
  - Name MDA Foundation the beneficiary of your policy
  - Donate an active, paid up policy

- **Cash**

*Consult your Financial Planner to determine the right planned gift for your financial situation
Planned Giving Summary – Why you & the MDA Foundation?

• Your opportunity to help the dental profession continue to create a happier, healthier and more productive Michigan

• A great way to honor your chosen profession & ensure dentistry is sustainable

• Through potential tax benefits, you can create a lasting legacy while benefitting you or your family’s future

• A perfect way to make a significant gift without using current cash flow

• Contact your financial planner to help you make the right planned gift based on your financial situation
For more information, please contact the MDA Foundation at
- Email: foundation@michigandental.org
- Telephone: 800-589-2632
- Website: https://foundation.michigandental/fundraising/ways-to-give/

Thank you for your time today and for all you do for the MDA Foundation

“Alone we can do so little. Together we can do so much.”

Helen Keller