



We Make Giving Easier

How your donors can generously support your NFP

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With the guidance of Sheridan Wealth Advisors (SWA), your nonprofit's donors can generously support your mission while leaving a significant legacy for their family. Whether you're a hospital, university, or religious organization, our innovative methods enable your donors to increase their giving.



Here's How Your Supporters Can Help

SWA provides four gift-giving options supporters can use to make a meaningful donation.

1. Charity-owned Life Insurance Policies – A Forensic Review of Life Insurance® can substantially increase a donor's gift without any cost to the donor or the charity.
2. Forensic Review of Life Insurance® – In 80% of cases, a Forensic Review of a

donor's life insurance policy can increase their benefits by 50%, if they are in relatively good health for their age and 75 years old or younger. Donating half of their benefit increase to your NFP permits everyone to benefit significantly.

3. Donate a no longer-needed life insurance policy – But, do it after a Forensic Review.
4. Donate appreciated stock – Simply gift the asset to your charity, or give the

charity part of this asset and purchase new life insurance with some of the assets to replace its full value for their family.

GIVE: Innovative options your donors can use to create life-changing funding for your non-profit and benefits for their family.

What Your Nonprofit Needs to Know

Your donors can use GIVE options to create life-changing funding for your nonprofit organization as well as benefits for their families. Our philanthropic brain trust at SWA stands by to discuss these options with you and your donors and refine them to fit everyone's requirements. These strategies are best suited for nonprofits that fit these parameters:

- You have an established foundation with \$25 million.
- You endorse planned giving, including the use of life insurance for charitable purposes.

- You have a mature donor base, such as an association of supporters, alumni, parents, or founders.
- You want to raise at least \$25 million.

Benefit from SWA's expertise

Sheridan Wealth Advisors has decades of expertise and experience in philanthropic fundraising, and now you can put its social capital to work to benefit your crucial mission.

SWA has secured \$250 million in ERC benefits for its clients, including \$75 million for colleges and hospitals and \$86 million for nonprofits, \$50 million as lay leaders for nonprofits, and another \$400 million in life insurance benefits. In our hands, a Forensic

Review of Life Insurance® is an innovative tool for increasing wealth.

The fundraising campaigns we have designed and led include new buildings, membership drives, and "burn the mortgage" programs. This is SWA's favorite work because it can help bring substantive financial support to your nonprofit's mission and purpose

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Be a Smart and Generous Philanthropist

Forensic Review of Life Insurance®

Donate one-half of the increase in your policy

In 80% of cases, a Forensic Review of a donor's life insurance policy can increase the benefits by 50%, if the donor is in relatively good health for his or her age and younger than 75.

For example, your donor has a \$1,000,000 Whole Life, Variable or Universal Life policy.

The Sheridan Wealth Advisors' solution:

A successful Forensic Review would create a new \$1,500,000 policy (an additional \$500,000)

Family receives: \$1,250,000

Foundation receives: \$250,000

Total benefits: \$1,500,000

**This is just one example. Each donor's results will be different as the facts and circumstances may vary.*