

Overflow

EMAIL

MARKETING

Game Plan

date

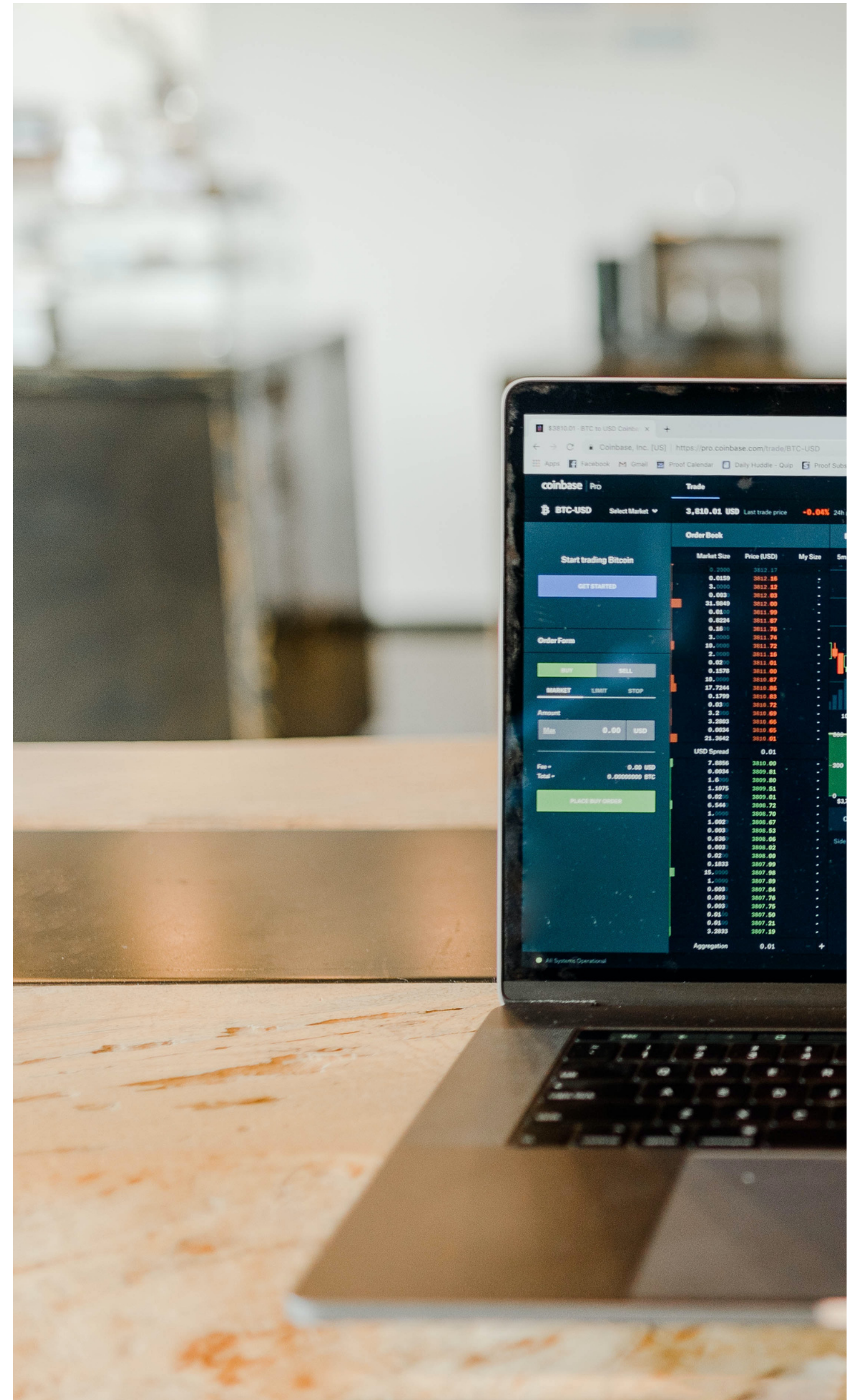
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#1

Game Plan Purpose

The goal

Leverage a minimal-time, high-reach fundraising channel to share the message of giving non-cash assets with your low-touch donors.



#2

Additional Outcomes

Email marketing benefits

Announce the ability to give non-cash assets to your low-touch donors __ Create a moment in time to share your organization's vision and current needs __ Keep Overflow top of mind for low-touch donors throughout the year __ Expand the reach of your current fundraising campaigns __ Educate your donors about giving non-cash assets



#3

Why Email Marketing

When to use this channel

Email marketing is a great channel to use when attempting to reach a large number of donors that don't fall into your major givers because it requires minimal time from your already strapped team. By including giving via stock or crypto in every email campaign, you will elevate giving non-cash assets to the level of cash and it will become a common way for people to participate in generosity with your organization. Emails also provide the real estate you need to begin educating your donors about giving in this way. Donating stock or crypto is not a commonly-known way to give, especially when it is now possible to do so online. Let's work together to educate them and unlock a larger pool of donations for your organization!



#4

How

The nitty gritty

There is no need to reinvent the wheel. Use Overflow's best-practice templates to easily incorporate non-cash giving into your current email marketing efforts. In this game plan, we'll walk you through each aspect of email marketing that you may be doing today, and how to add-in the message of giving stock or crypto.



TOOL ^{#1} EMAIL ANNOUNCEMENT

HOW TO USE THIS TOOL:

one	Select your organization's main focus, campaign or need at this time. What are you asking donors to give towards right now that will make a significant impact for your organization?
two	Segment your email list. Who should learn about Overflow from a general announcement?
three	Create the email announcement layout. Feel free to use the exact text provided in this tool!
four	Ensure all links lead to either your giving page with the Donate Stock and Donate Crypto buttons prominently displayed or lead donors directly to your co-branded Overflow pages.

TOOL # 1 EXAMPLE LAYOUT

Fundraising Focus

Grab their attention with why they should give!

Announce Overflow

How they can participate in your mission.

We're excited to announce that you can now support our mission by giving from your gains. How? We've partnered with Overflow to make giving via stock or crypto quick, easy, and secure. You can even give directly from your phone! If you've never donated stock or crypto before, it's an easy, tax-efficient way to give. By donating stock directly, you could avoid up to 20% in capital gains taxes. Plus, you may be able to deduct the full market value of the donation as a charitable gift just like cash. To understand the full tax benefits of giving appreciated stock, including potential state tax savings, please consult with your tax professional.

How to Give

Include your unique Overflow URLs

Closing Statement

Final appeal to inspire donors to give

"Just 1 share of Google is 10% of our fundraising goal. Join us today"

"Give from your gains this year and maximize your impact."



TIP: Don't forget to include impactful imagery!

TOOL ^{#2} EDUCATION CAMPAIGN

HOW TO USE THIS TOOL:

Choose your own adventure! There are two options for kicking off this campaign:

one	Segment your list. Choose a group that you believe has the ability to give stock, but don't have financial advisors. This is probably your mid-tier donors that you engage with at a low-touch level. You can segment by area (using zip codes), place of employment, etc. to determine who best to target with this campaign.
two	The other option is to send this campaign on an opt-in basis. For example, you can include a "Want to learn more about giving non-cash assets?" link in your announcement email (see Tool #1) or on your giving page. By offering the option to opt-in, you ensure that this drip campaign is relevant to your donor.

TOOL #2 EDUCATION CAMPAIGN	
Email #1 Inspire future philanthropists	1 - Share with your supporters the purpose of this email series and your desire to be their philanthropic partner. 2 - Focus on the first important "Why?": Why should the donor give to your organization? What is your need? Why does their philanthropy matter?
Email #2 Educate about giving non-cash assets	<p>Now that the giver is excited to engage in philanthropy with your organization and grow with you, it's time to add value to the relationship by educating them about why to give non-cash assets.</p> <p>1 - Donors can deduct 100% of the fair market value of the gift from their taxes (just like cash)*</p> <p>2 - Plus they can avoid up to 20% in capital gains taxes. (If they had chosen to liquidate the asset and donate cash, they could owe up to 20% in taxes to the IRS. But by donating assets directly to you, they can avoid that tax).**</p> <p>It's a win-win!</p> <p>*NOTE: Always recommend that donors ask their tax advisor to understand their personal tax implications.</p>

*This assumes the top individual federal income tax bracket for a taxpayer that is itemizing tax deductions and does take into account Adjusted Gross Income limitations on charitable contributions. This does not take into account state or local taxes, if any.

**This assumes all realized gains are subject to the maximum federal long-term capital gains tax rate of 20%, and that the donor originally planned to sell the stock and contribute the net proceeds (less the capital gains tax) to charity. This does not take into account state or local taxes, if any.

TOOL #2 EDUCATION CAMPAIGN

Email #3

How to give

In this installment, educate your donors about how they can give stock or crypto to your organization. We recommend including a link to give in Email #2, but in this email, you will have more real estate to walk through the full donation experience.

STOCK:

- Log in using an email or phone number and a one-time passcode
- Connect a brokerage account
- Select type and amount of shares to give

CRYPTO:

- Log in using an email or phone number and a one-time passcode
- Select the type and amount of coin to give
- Scan a QR code to send the donation from your personal crypto wallet

TOP TIP: Include videos! Here's a great demo of the stock experience.

Email #4

Educate about giving
non-cash assets


We hope this email series is just the beginning of a fruitful partnership with your supporters. Here are a few ideas to close out this series while inspiring future engagement:

- 1 - Provide additional ways the supporter can get involved with your organization, whether that be following you on social media, volunteering, participating in a peer-to-peer campaign, pen pal relationships, the list goes on!
- 2 - Set expectations - how do you plan to continue to engage with them? For example, do you send quarterly impact reports? Is there an upcoming event they can participate in? When can they expect to hear from you next?
- 3 - Include a video from your organization's leader thanking them for their time, philanthropy, and engagement in the work you are doing.

TOOL ^{#3} KEEP IT CONSISTENT

They say it takes 7 times of hearing something before people remember it. That means the more you can include the message of giving non-cash assets in all your fundraising efforts, the more this way of giving will catch on. Here are some ideas for including this message in all your email marketing efforts.

TOOL # 3: KEEP IT CONSISTENT

Email Newsletters	<p>You most likely have an email newsletter template with a Donate button. Make sure that Donate button links to the giving page with the stock and crypto options listed. Even better, include a banner on each newsletter: "Donating stock can be one of the most tax-efficient ways to give. We've partnered with Overflow to make donating stock online quick, easy, and secure. GIVE NOW".</p> <p>Check out this great example from Positive Coaching Alliance:</p> <div></div> <div><p><i>Donating stock can be one of the most tax-efficient ways to give. PCA has partnered with Overflow to make donating stock as simple as a few clicks.</i></p></div>
Year-End Appeals	<p>Year-end is a fantastic time to highlight the message of giving via stock and crypto because donors are already thinking about how they can maximize their tax savings through charitable gifts. Here's an example blurb you can include in your year-end appeals:</p> <p>"As the tax year comes to a close and you are thinking about how best to donate your dollars, would you consider giving a gift of stock to our organization? By donating via stock, you could save up to 20%* in capital gains taxes and up to 37%** in federal income taxes based on the value of the charitable donation when itemizing deductions. To understand the full tax benefits of giving appreciated stock, including potential state tax savings, please consult with your tax professional."</p> <p>March through April is also a great time to remind donors of this way to give when taxes are top of mind!</p>

**NOW GO OUT AND INSPIRE
THE WORLD TO GIVE!**

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