

Overflow

In-Person Event

GAME PLAN

date

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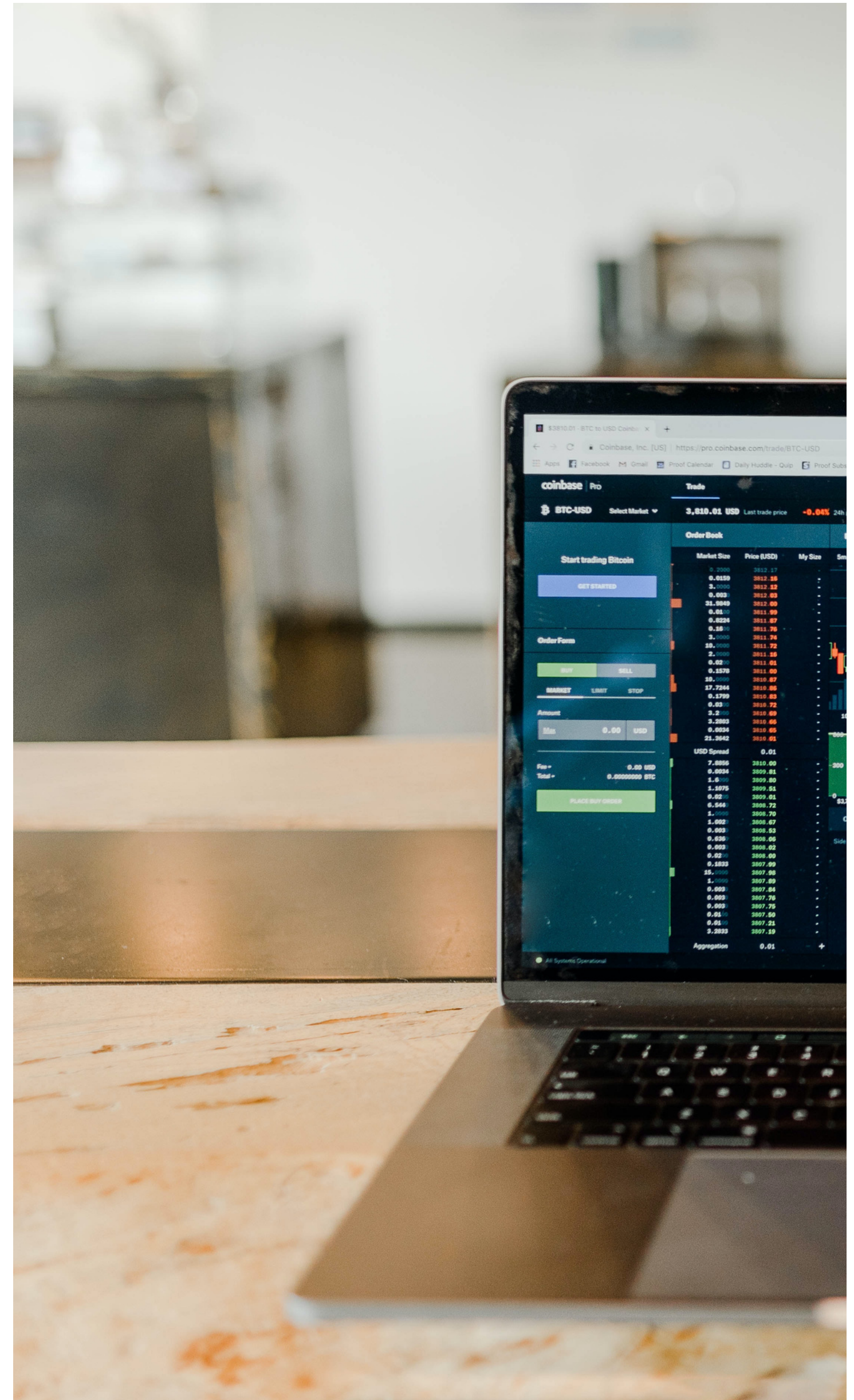


#1

Game Plan Purpose

The goal

Guests attending your event hold 90% of their wealth in non-cash assets. If you only ask for cash donations, you are leaving significant funding for your programs on the table. This event is one of your biggest fundraising opportunities of the year - make it count! Use these strategies to incorporate the message of donating via stock before, during, and after the event to exceed your fundraising goal.



#2

Additional Outcomes

So many reasons to use this game plan!

Leverage this key moment in time to inspire donors to contribute at a higher level __ Educate your most loyal supporters about giving via non-cash assets __ Unlock net-new donations from guests __ Establish trust and credibility in giving non-cash assets online



#3

Why In-Person Events

Why share about non-cash giving at events

Events provide a great platform to inspire people to get behind the work you are doing. The high emotion and excitement of an in-person event combined with peer encouragement to give can lead to more generosity in a single evening than many other fundraising channels combined. This environment is a great platform to build trust in your organization and educate your donors about the ways they can participate. Use this time to share about giving non-cash assets, the tax benefits, and how easy it is to do online. Your audience is not only captive but inspired to give, and now is a great time to encourage them to give in a way that results in donations that are 76x those of cash.



#4

How

Tools and resources in this guide

Use Overflow's best-practice templates and Event Checklist to incorporate donating via stock and crypto in every aspect of your event: before (tool #1), during (tool #2), and after (tool #3). The following tools will walk you through specific strategies and language to share this message - and host your most successful fundraising event ever!



EVENT CHECKLIST

Have you incorporated giving via non-cash assets in the following aspects of your event?

PRE-EVENT

- Invitations + communications
- Registration page
- Invitation calls to top donors

NIGHT-OF

- From stage
- Program insert

POST-EVENT

- Thank you email

TOOL #1

PRE-EVENT COMMUNICATION

How to use this tool:

Giving via stock and crypto shouldn't be something your donors hear about for the first time at your event. They say it takes 7 times for someone to hear something before they remember it. With that in mind, let's make giving via stock and crypto a well-known way donors can participate in philanthropy with your organization. This tool highlights three ways to incorporate giving non-cash assets before the event: - Pre-event emails - Registration page - Invitation calls

Pre-Event Emails

In the invitation email and any communications leading up to the event, include a blurb about ways people can purchase their tickets and give to your organization even before the event begins.

TOOL # 1: EXAMPLE PRE-EVENT EMAIL

We've partnered with Overflow to allow you to purchase your gala tickets with stock through an easy, secure, online platform. If you've experienced significant gains within your stock portfolio this year, this is a great way to support our organization and avoid up to 20% in capital gains taxes on those assets.

[> Purchase your ticket with stock](#)

*Note: Any stock gift that is a higher value than the ticket price will be counted as a donation. Thank you for your generosity!

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TOOL #1

PRE-EVENT REGISTRATION PAGE

The Placement	<p>No matter what event platform you are using, you can incorporate a way for people to give non-cash assets before the event begins. Here are two strategies we recommend:</p> <ul style="list-style-type: none">#1: As a way to purchase tickets#2: With a "Donate Stock" button on the page itself.
The Messaging	<p>Giving stock online is a new way for people to give. Make sure to include a brief blurb explaining why and how to give stock to your organization. Link directly to the Overflow stock donation experience or your giving page with stock donating FAQs.</p> <p>You can give stock online and it is quick, easy, and secure. By donating stock directly, you could save up to 20% in capital gains taxes plus take a charitable tax deduction. Learn more or give stock now"</p>

TOOL # 1: REGISTRATION PAGE EXAMPLE

PREMIER COMMUNITY PARTNER
\$5,000

TICKETS

PURCHASE WITH STOCKS

Premier Seating for Two

Recognition and Listing on Program

Invitations to Donor and Member Events throughout the Year

PREMIER GALA TICKET
\$2,500

TICKETS

PURCHASE WITH STOCKS

Premier Seating for One

Recognition and Listing on Program

Invitations to Donor and Member Events throughout the Year

GALA TICKET (LIMITED)
\$1,000 - SOLD OUT

SOLD OUT

We've partnered with Overflow to allow you to purchase your gala tickets with stock through an easy, secure, online platform. If you've experienced significant gains within your stock portfolio this year, this is a great way to support LA Dance Project and avoid up to 37% in capital gains taxes on those assets.

LEARN MORE

TOOL ^{#1}

PRE-EVENT: INVITATION CALLS

Why Call?

It is amazing the relationships you are able to build by calling someone on the phone! Emails are easy to ignore, but a personal phone call goes a long way. That's why we highly recommend calling to invite your top-tier donors to the event as well as to thank them for registering and give them any information they may need as a table sponsor or VIP guest. Phone calls allow you to ask the question, "have you considered paying for your ticket or giving via stock?"

The Talk Track

Once the connection has been made and a donor is interested in attending and/or giving to your organization, here is our recommended talk track for encouraging a donor to give via stock:

"Have you considered donating stock before? We partner with a platform called Overflow that makes donating stock as easy as donating via cash or credit, plus it could be tax-advantageous for you as the donor. You could potentially save up to 20% in capital gains taxes*. That means more of your gift goes directly to the cause you care about. You will be able to purchase your tickets with stock and also can donate stock before, during, or after the event using our online portal. Would you consider maximizing your donation in this way?"

*If they ask for further tax information, always let them know you are not a tax professional: "To understand the full tax benefits of giving appreciated stock, including potential state tax savings, please consult with your personal tax professional."

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TOOL #2

THE BIG NIGHT: MAKE THE ASK

HOW TO USE THIS TOOL:

Donors are some of the most receptive they will ever be to your organization's mission, vision, and needs during the event itself. So don't be afraid to make the ask - and let supporters know how they can participate! There are two moments during the event that are key to sharing ways to give:

- 1 - On Stage
- 2 - Within the Program

If you would like this slide customized for your organization, please email support@overflow.co



TOOL #2

THE BIG NIGHT: ON STAGE

Equip your MC with a talk track, a supporting slide, and a demo to make an effective ask - and educate donors on how they can fulfill their intent to give.

THE TALK TRACK

"You can participate in our mission in a lot of different ways, including giving assets from your stock portfolio or crypto wallet directly to our organization which can avoid capital gains taxes. Scan the QR code behind me to give now from your phone."

OR

"You can participate in our mission in a variety of ways. We encourage you to complete the pledge card, and of course cash is always an option. But we've also partnered with a tool called Overflow to make it easy and secure for you to give stock, IRAs, and crypto donations online. We know this is going to unlock incredible generosity so we can continue our work. Some of you have assets in your stock portfolios or crypto wallets and you now have an opportunity to give from that pocket. We encourage you to do so because it is a tax-efficient way to give. When you give these assets directly to our organization and we liquidate it you are not subject to capital gains taxes and neither are we as a 501c3 organization. This is an incredible win-win situation. Scan the QR code behind me to give in this way."

THE DEMO

Consider playing a 30-second demo of the Overflow giving experience behind the MC as he shares the giving message. [Click here to access our Launch Library](#) which includes Overflow product demos.

TOOL #2

THE BIG NIGHT: PROGRAM INSERT

HOW TO USE THIS TOOL:

Whether it is a dedicated giving page or a boxed call-out, including ways to give in the program provides guests with a static place to reference how to participate in generosity with your organization both during the event and beyond. Complete each section below to design an inspirational program insert:

IN THE PROGRAM:

Event Goal

What is your fundraising goal for the event?
What need can the donor help meet?

Spotlight Stock Giving

How a donation of stock can meet your event goal.

Just 10 shares of Google can meet 1/4 of our fundraising goal tonight. We've partnered with Overflow to make giving via stock quick, easy, and secure. You can even give directly from your phone! If you've never donated stock 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.

Ways to Give

Include your unique Overflow URLs and a QR code to bridge the gap from paper to online giving.

Closing Statement

Final appeal to inspire donors to give

"Give from your gains and maximize your impact."

TIP: Include a donor testimonial or impactful story to drive action.

TOOL ^{#3}

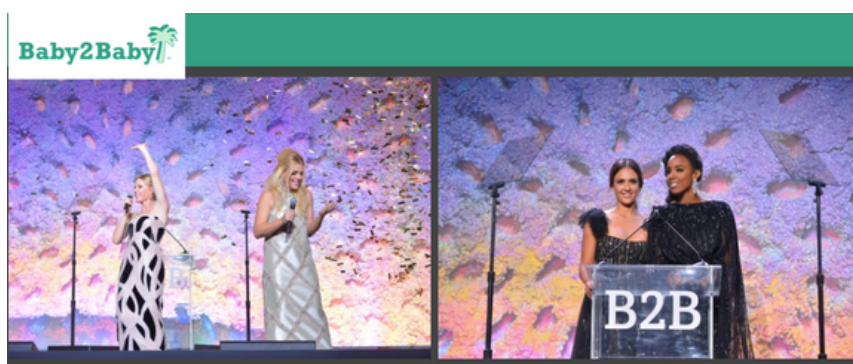
THE FOLLOW UP

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The most important thing you can do in the post-event communications is to thank your guests. You just had an incredible touch point with your supporters, so the goal is to solidify that relationship and create a donor for life. There are many fun "thank you" ideas out there, but here are just a few:

POST-EVENT COMMUNICATION IDEAS

Photo Board



Share an online photo board (like [this one from Baby2Baby](#)) to thank guests for their support and offer an additional touch-point after the event ends.

Next Steps

If you were moved by your experience at the gala, we invite you to continue to engage with us. [Click here](#) for further opportunities to support and participate in our events.

The goal of any event is to inspire donors to engage even more with your organization, so don't leave them hanging! Give guests ways to continue to participate in your programs.

Testimonial



If your staff noticed someone particularly engaged at the event, ask for a testimonial! Donor testimonials can work wonders to establish trust in your organization.

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

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