



A RESOURCE FOR NONPROFIT LEADERS

NONPROFIT PARTNER GUIDE

DONORS · ORGANIZATIONS · COMMUNITIES

Helping your donors give more, your organization grow stronger, and the people you serve go further.

1024WEALTH.COM

YOUR DONORS WANT TO MAKE A BIGGER DIFFERENCE.

MOST DON'T KNOW THEY CAN.

Your donors love your organization. They believe in your mission, and many give sacrificially and consistently, year after year. Most of that giving comes from their checking account, often from whatever is left at the end of the month. That means the largest gift they could make is often one they never knew was available.

There are strategies, many built around life insurance, that let a donor make a gift far larger than their checkbook suggests, in many cases without adding to their monthly budget. Some of your donors already own the asset that makes this possible and have no idea.

What many are missing is information: someone to show them what's possible in plain language, with no pressure.

That's where we come in.

I'm Jason K. Powers, founder of 1024 Wealth. We help people rethink how they give to the causes they care about, and how to give more than they thought possible. We partner with nonprofits as a resource for their donors, their organization, and the people they serve, usually at no cost to you.

That includes:

- Education for your donors, delivered however it fits your organization
- Free one-on-one strategy conversations for anyone who wants to explore their options
- Hands-on help putting a plan in place for those ready to set something up

You keep your donor relationships and your voice. We bring the education and handle the details.



INSIDE THIS GUIDE

- Ways we can help with donor education
- Strategies that help your donors give more
- Support for your organization's own financial strength
- Support for the individuals and families you serve

A woman with blonde hair, wearing a dark blazer, stands at a wooden podium, gesturing with her hands as she speaks. She is facing an audience seated at round tables in a dimly lit room. The audience members are seen from behind, looking towards the speaker. The overall atmosphere is professional and focused.

WAYS WE CAN HELP

EDUCATION THAT FITS THE WAY YOU ALREADY REACH YOUR DONORS.

Every organization connects with its supporters differently. We work within your existing calendar and channels, so donor education feels like a natural part of your mission and not one more ask. Everything is shaped around your organization and approved by you before it reaches your donors.

DONOR EVENTS & GALAS

A short, engaging talk on smarter ways to give, fitted to your program and time slot.

WEBINARS

Live or recorded sessions your donors can join from anywhere.

WEBSITE CONTENT

A giving strategies page or article that answers the question, "How else can I give?"

ONE-ON-ONE CONVERSATIONS

When a donor wants to explore their options, we meet with them directly at no cost.

SMALL GROUP GATHERINGS

Lunch-and-learns, donor appreciation events, or intimate gatherings for your most committed supporters.

EMAIL CONTENT

Ready-to-send pieces for your newsletter or donor communications, written in plain language.

BOARD & STAFF SESSIONS

Helping your leadership and development team recognize when a donor may have a larger gift available, and when to bring us in.

SOMETHING ELSE?

Have another way you connect with supporters? If it isn't listed here, let's talk about it.



STRATEGIES THAT HELP YOUR DONORS GIVE MORE

BIGGER GIFTS, OFTEN WITHOUT A BIGGER CHECK

Most donors have more giving capacity than they realize, but it isn't sitting in their checking account. The right approach depends on each donor's goals, family, and finances.

LIFE INSURANCE: THE MOST OVERLOOKED GIVING TOOL

One of the most effective ways to create a larger gift is life insurance. Most people think of it only as protection for their family and don't realize how many ways it can support the causes they care about. Some of those ways include:

- **Naming your organization as a beneficiary.** A simple step using a policy the donor already owns. Nothing changes in their budget today, and your organization receives a lasting gift later.
- **Giving from what's already there.** Many donors have cash value quietly building inside policies they've owned for years. That cash value can fund a gift now, or a stream of gifts over time, while the donor stays in control.
- **Giving an existing policy.** A policy a donor no longer needs for its original purpose can become a meaningful gift to your mission.
- **Creating a new legacy gift.** Modest, manageable contributions can grow into a gift many times larger than the donor could ever write a check for.
- **Involving family or business partners.** Some donors build a gift together with loved ones or business associates, extending their impact across generations.

OTHER APPROACHES

- **Giving from retirement accounts.** For donors at certain ages, retirement dollars can go directly to your mission in a highly tax-efficient way.
- **Leaving a gift through a trust.** Trust-based strategies can provide income for the donor, a significant future gift for your organization, and protection for the donor's family.

Which approach fits depends on details that only come out in a conversation.

That's where we come in.

WHAT YOUR ORGANIZATION MAY NEED

Some of these approaches work best when your organization has a gift acceptance policy in place. We can help your team think through what that looks like.

STRENGTHENING YOUR ORGANIZATION

Expand your vision. Sustain your momentum. Fund your mission for the long haul.

Donor education is one side of what we do. The same planning that helps families protect, save, and grow can also strengthen the organization serving your mission.

PROTECT

- **Key person protection.** Your organization depends on its leaders. Protection for key people keeps a sudden loss from turning into a financial crisis, and can help guarantee repayment of any loans your organization carries.
- **Staff benefits.** Meaningful benefits help you attract and keep the people who carry your mission forward, often at a cost that fits a nonprofit budget.
- **Income protection.** If a key leader can't work because of illness or injury, the right coverage helps both that person and your organization through it.

SAVE

- **Reserve and cash strategy.** Building reserves inside cash value policies gives your organization funds it can access when opportunities or emergencies arise.
- **Leadership retirement and succession.** Plan for your leaders' retirement and the transition that follows, including benefits for surviving spouses and families.

GROW

- **Life insurance growth strategies.** Properly designed life insurance policies can grow cash value steadily over time without direct exposure to market swings. The cash value stays accessible, so your organization can use it, repay it, and use it again, keeping your capital working for your mission.
- **Endowment and investment support.** Through a trusted team of licensed investment professionals we work alongside, your organization can access guidance on endowments and long-term investment strategy.

Every organization's needs are different. A strategy conversation is the best place to start.



SUPPORTING THE PEOPLE YOU SERVE

HELP THAT LASTS BEYOND THE GRANT

If your organization provides grants or relief funding, you know the need is real and immediate. A grant can cover a medical bill, a gap in income, or the next step in someone's creative work. But many people end up in the same cycle. They save up, something comes along, the savings disappear, and debt fills the gap. Without a new way of thinking about money, the cycle usually starts over.

When your organization hands someone a significant sum of money, what happens next? Some grants come with clear guidelines for how the funds can be used, and many don't. Either way, money without guidance can disappear quickly and leave the underlying problem in place. Pairing your support with education gives recipients the tools to make it last. It also gives your organization confidence that its generosity is creating lasting change.

That's where we come in. The people who break the cycle learn to make their money flow toward them instead of away from them. We help the individuals and families you serve start that shift, so every dollar you grant goes further.

Using the same Protect, Save, and Grow approach, we help recipients:

- **Protect** their income and their families from the next unexpected setback
- **Save** in a way that builds a real cushion instead of a temporary one
- **Grow** toward long-term stability and control over their own finances

HOW IT WORKS

One-on-one conversations. Private, no-cost strategy conversations for any recipient who wants help thinking through their situation.

Workshops. Group sessions for your grant recipients, program participants, or cohorts, arranged around your schedule. Education first, with no pressure, and always in service of your mission.



WHAT THIS CAN LOOK LIKE

EXAMPLE SCENARIOS FROM DONORS, ORGANIZATIONS, AND COMMUNITIES

The retired couple who found a gift they already had.

A retired couple had supported a local school with modest annual gifts for years. In a strategy conversation, they realized a whole life policy they'd owned for decades was no longer needed for its original purpose now that their children were grown. They named the school as a partial beneficiary and began directing the policy's annual dividends to the school as a yearly gift. Their giving grew without touching their monthly budget, and the school now has a significant future gift on the way.

The young professional who became a legacy donor.

A professional in her late thirties gave a small monthly gift to an arts organization she loved. After attending a donor education session at the organization's annual event, she put a similar monthly amount toward a new life insurance policy naming the organization. At her age, that modest commitment will create a future gift many times larger than decades of monthly checks.

The founder who protected his organization.

A small nonprofit relied heavily on its founding executive director, who held most of its key donor relationships and had helped secure a loan for a new facility. The board realized a sudden loss would put both the loan and the mission at risk. Key person protection now gives the board confidence that the organization can handle a transition and still honor its commitments.

The nonprofit that put its reserves to work.

An organization kept its emergency reserves in a low-interest savings account. Part of those reserves went into properly designed life insurance building cash value the organization could access. When a large grant payment was delayed, it used that cash value to cover operations, then repaid it once the grant arrived, keeping its programs running without interruption.

The musician who broke the cycle.

A working musician received a relief grant to cover unexpected medical bills. Through one-on-one conversations offered by the grantmaking organization, he learned how to manage irregular income, protect himself from the next setback, and build a real cushion. The grant solved the immediate problem, and the education changed how he handles money going forward.

Every story starts with a conversation.

LET'S TALK

YOUR DONORS ARE READY TO DO MORE. LET'S SHOW THEM HOW.

Whether you want to schedule a donor event, explore strategies for your organization, or connect us with the people you serve, it starts with a conversation. There's no cost and no obligation.

Jason K. Powers

Founder, 1024 Wealth

PHONE 720.458.6900

EMAIL ibc@1024wealth.com

WEB 1024wealth.com



This guide is for general educational purposes only and is not tax, legal, or investment advice. Individuals and organizations should consult their own tax and legal advisors. Case studies are hypothetical examples for illustration only; individual results will vary.



THANK YOU

FOR THE WORK YOU DO

1024WEALTH.COM

Protect. Save. Grow.