

Philanthropic Services

NFP National Madison is among an elite group of insurance professionals dedicated to providing sophisticated philanthropic planning strategies. With nearly three decades of experience, we have the ability to help donors and non-profit organizations structure charitable plans that can help them reach their goals.

Education Is Our Focus

We believe that education is the only way to design a comprehensive charitable plan. Donors rely on the advice and guidance of their personal advisors as well as the development officers with whom they have a relationship. It is crucial that everyone involved in a planned or major gift be fully educated about all aspects and phases of the overall plan.

Life insurance has many purposes in charitable estate planning and can be utilized in a myriad of strategies. However, if even one of the parties to the plan does not understand this particular financial tool, it can be detrimental to the success of the gift.

We work to educate donors, development officer and professional advisors on the many uses of life insurance. We analyze policies, offer advice and insight, and

carefully construct plans that optimize the benefits and features of the life insurance policy.

We also work with non-profit organizations to help educate their development staff so that they may effectively discuss and solicit life insurance gifts from their donors.

Relationships Are Our Business

Non-profit organizations know that the health and welfare of their organization depends on cultivating and stewarding long-term relationships with their donors.

We know that implementing a charitable gift is not a transaction, rather it is the beginning of a long-term relationship with the donor. We help non-profit organizations stay connected



with their donors by providing the tools development officers need to communicate effectively about gifts of life insurance. This includes assistance with drafting solicitation materials as well as annual auditing and reporting services to update both the donor and the organization about the status of the gift.

Services

- Current Policy Administration - Annual Reviews, Service, Maintenance and Audits
- Proposal, Presentation and Solicitation Material Creation
- Educational Resources for Development Officers
- Creating Life Legacy Programs
- General Endowment Funding Plans and Special Structures for Endowing Chairs and Projects
- General Wealth Transfer and Charitable Planning Strategies
(including but not limited to):
 - Charitable Lead Trusts
 - Charitable Remainder Trusts
 - Credit Shelter Trusts with Life Insurance
 - Dynasty Trusts
 - Grantor Retained Annuity Trusts
 - Irrevocable Life Insurance Trusts
 - Life Insurance as an Asset
 - Lifetime Gifting
 - Premium Financing
 - Private Financing
 - Private Split Dollar
 - Sale to a Grantor Trust
 - Wealth Replacement Trusts
- General Insurance Consulting and Administration
- Proposed Insurance Gift Analysis
- Charitable Annuity Arbitrage

About Us

NFP National Madison is a wholly-owned subsidiary of NFP (National Financial Partners Corp, NYSE: NFP). The support of NFP, currently ranked the 8th Top Global Insurance Broker by Best's Review, allows us to directly access major life insurance carriers, provide competitive, superior products and utilize the resources that only a major independent organization can provide.

As a boutique firm, we are also able to provide uniquely tailored solutions to our clients. We have very skilled, dedicated staff with expertise in estate planning and tax law, medical and financial underwriting, case design, insurance policy evaluation and client services and have an in-house communications department to personally draft and tailor presentations that you can confidently deliver to your donors. We provide all the services necessary for a non-profit organizations to easily and seamlessly integrate life insurance into their major and planned gift programs.

For further information, please contact:

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Additional resources available on our website: www.nationalmadison.com.