

Thank you in advance for completing this survey.

Instructions

1. While we encourage you to answer all questions, please feel free to skip any question that you do not feel comfortable answering.
2. Please complete and return within the next 10 days. Your input is critical to our future success.
3. Please mail your completed survey in the enclosed postage-paid envelope to:
**Survey Response Center, Phi Gamma Delta Educational Foundation,
 9920 Watson Rd., Ste. 110, St. Louis, MO 63126.**

1. As a graduate brother, please rate your level of enjoyment, benefit or use from:
 (5 is very important and 1 is not important. Circle your choice.)

	NOT IMPORTANT	SOMEWHAT IMPORTANT	VERY IMPORTANT
A Phi Gamma Delta magazine.....	1	2	3
B Fraternity website www.phigam.org.....	1	2	3
C Chapter events such as class reunions or Pig Dinners.....	1	2	3
D Chapter newsletters/communications.....	1	2	3
E City/regional graduate chapter (non-chapter specific).....	1	2	3

2. Phi Gamma Delta plans to spend time and energy on the following ways to strengthen chapters and members in the future. Please rank the level of importance to you: (5 is very important and 1 is not important. Circle your choice.)

	NOT IMPORTANT	SOMEWHAT IMPORTANT	VERY IMPORTANT
A Building Courageous Leaders (values-based leadership).....	1	2	3
B Alcohol education and risk reduction programs.....	1	2	3
C Merit-based and tuition scholarships.....	1	2	3
D Mental health and suicide prevention counseling.....	1	2	3
E Phi Leadership Academy (chapter operations and leadership).....	1	2	3
F Assisting chapters with graduate communication such as newsletters, emails, directories and websites.....	1	2	3
G Social, interpersonal, and recruitment skills.....	1	2	3

3. In general, what is the best way for Phi Gamma Delta to communicate with you about chapter news and information?

- A Paper

4. Specifically, in addition to the Phi Gamma Delta Educational Foundation, what other organizations or charities do you support with gifts? (Please check all that apply.)

- A Phi Gamma Delta Fraternity and/or Chapter Programs
- B Direct mail
- C Chapter newsletters
- D Chapter events
- E Estate/plan
- F Environmental causes
- G Military or veterans' charities
- H Political action groups
- I Religious institutions or charities
- J Health-related causes
- K Educational institutions
- L Cultural institutions

5. After you hear from the Leadership Council, how do you plan to respond?

- A Thank you letter
- B Phone call
- C Update contact information

I. WHY YOU SUPPORT PHIGAM

6. The following reasons are the most common reasons why you support Phigam. How important are these reasons to you?

- A Phi Gamma Delta Fraternity
- B I fondly remember my college days
- C Building Courageous Leaders
- D The Phi Gamma Delta Fraternity provides educational opportunities
- E A gift to the Phi Gamma Delta Fraternity is a good investment
- F I know my gift will help

13. In addition to the Phi Gamma Delta Educational Foundation, what other organizations or charities do you support with gifts? (Please check all that apply.)

A Phi Gamma Delta Fraternity and/or Chapter Programs
 B Direct mail
 C Chapter newsletters
 D Chapter events
 E Estate/plan

F Environmental causes
 G Military or veterans' charities
 H Political action groups
 I Religious institutions or charities
 J Health-related causes
 K Educational institutions
 L Cultural institutions

14. Congress has recently changed the tax laws. Have you determined how this may affect your charitable giving to the Foundation?

A I don't know yet.
 B It probably will not affect my giving.
 C It probably will negatively affect my giving.
 D It probably will positively affect my giving.

IV. PLEASE TELL US A LITTLE BIT ABOUT YOU

15. Age Group
 A Under 40
 B 40-49
 C 50-59
 D 60-64
 E 65-69
 F 70-74
 G 75-79
 H 80 or older

16. Marital Status
 A Married
 B Partnered
 C Divorced
 D Widowed
 E Single

17. Parental Status (Please check all that apply.)
 A Children
 B Grandchildren
 C No Children

18. Please share your thoughts regarding Phi Gamma Delta and how the Phi Gamma Delta Educational Foundation can better influence our brothers.

V. FOLLOW-UP INFORMATION

19. Would you enjoy hearing more about Phi Gamma Delta's plans from a staff member who may be traveling in your area in the future?

A Yes
 B No

20. Would you like any of the following?

A Information on giving to the Phi Gamma Delta Educational Foundation through my will or living trust
 B I have already made a gift to the Phi Gamma Delta Educational Foundation in my will or revocable living trust. Please send me information about White Star Legacy Society benefits.
 C Information on gifts that pay me income for life
 D Information on making gifts of property, including real estate
 E Information on making gifts of securities, including stock
 F Contact me to discuss directing a gift to a specific program or initiative (If you prefer, please contact Ben Robinson, Executive Director, at 859-255-1848 x133 or brobinson@phigam.org.)

If your contact information has changed, please make updates here:

[FULL NAME] _____
 [ADDRESS1] _____
 [ADDRESS2] _____
 [ADDRESS3] _____
 [CITY], [ST] [ZIP5]-[ZIP4] _____

[EMAIL]: _____
 [PHONE]: _____
 [CLIENTRN] _____

Thank you for your input. We deeply appreciate the time you have taken to help us enhance the Phi Gamma Delta Educational Foundation's commitment to Building Courageous Leaders.

7. How important is each of the following factors when you are considering making a gift to the Phi Gamma Delta Educational Foundation or your Phi chapter? (5 is very important and 1 is not important. Circle your choice.)

- A Peer
- B Potentially
- C Payable
- D Expected
- E Ability
- F Tax
- G Gift
- H Gift

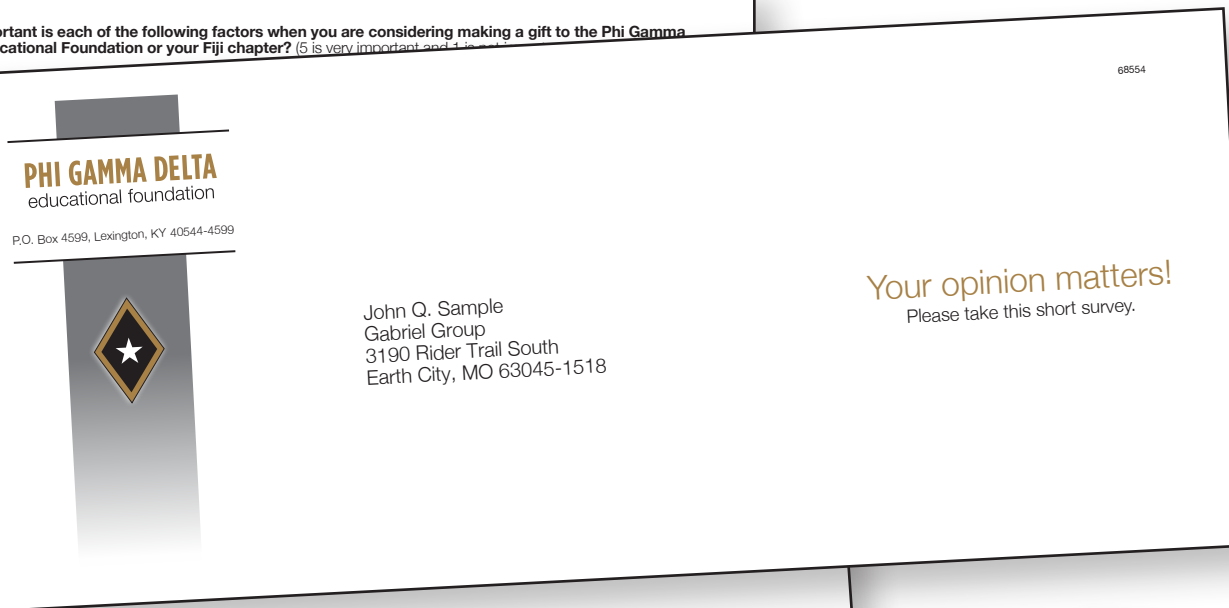
II. GIFT

8. In what way do you plan to make a gift?

- A I am
- B I am
- C I am
- D I am
- E I have
- F I have
- G I have
- H I have
- I I have
- J I volun

9. Which of the following factors are most important to you in making a gift?

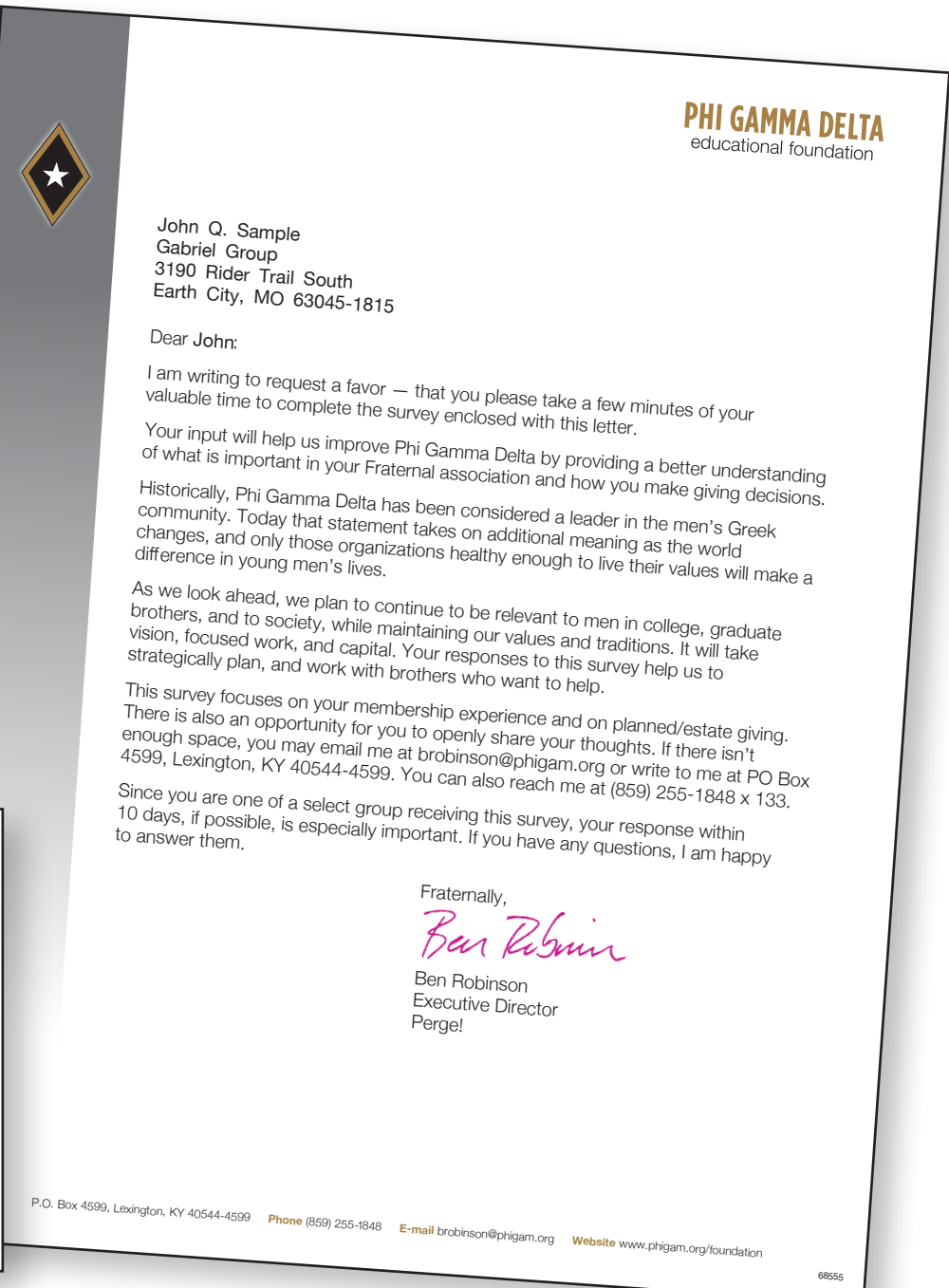
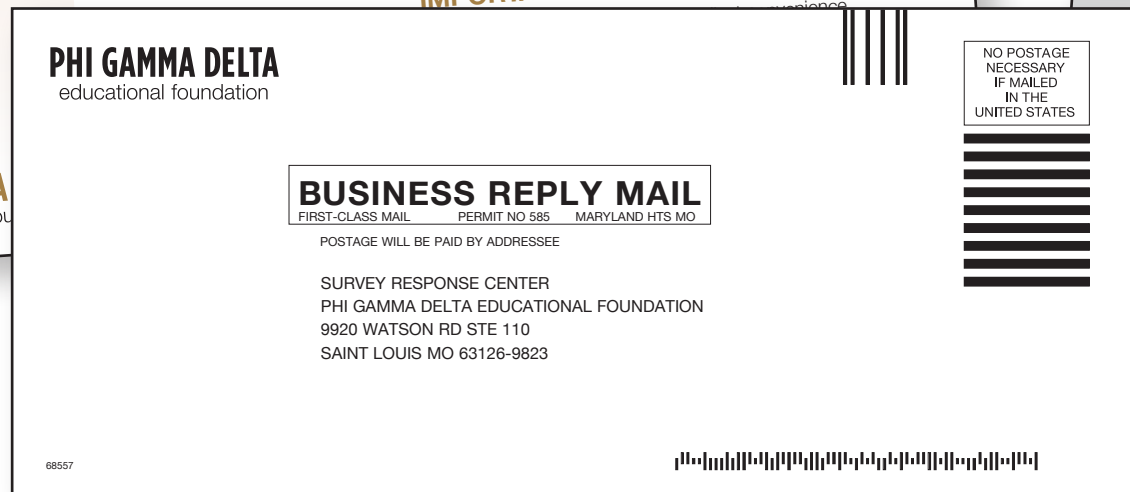
- A Genera
- B Studer
- C Leader
- D Charit



PHI GAMMA DELTA
 educational foundation

DONOR INSIGHT
 SURVEY
 FOR
 BROTHER SAMPLE

IMPORTANT NOTE:



**PHI GAMMA DELTA
 EDUCATIONAL FOUNDATION**

In an effort to uncover planned giving leads, a Donor Insight Survey was developed and sent to a select donor audience for Phi Gamma Delta. Several key questions indicated respondents' knowledge of and interest in various estate planning vehicles to provide gift planners with a robust pipeline of qualified planned giving prospects. The Survey generated 796 responses (15.88%), identified 376 highly qualified leads (7.50%) and uncovered 58 existing bequests and 87 responders with no heirs. The Foundation closed 12 estate gifts after the Survey as well.

