Fundraising Division

Who we are
What we do
Where we’re going
Outline

History
Organizational Chart
Department Fundraising
Non-member Donors
Donor Profile
Planned Giving
Insurance
USAA
Next Steps
Department Fundraising

Campaign Summary for Calendar Year 2010

- 31 departments participated
- 50 unique campaigns
- Over 1.9 million pieces mailed
- Over $1.1 million in net profit for departments
Standard Campaigns

Spring Labels

All Occasion Cards
Standard Campaigns

Holiday Labels & Holiday Cards

Calendars
Standard Campaigns

Sweepstakes

Others as requested
Total donors and overall revenue has increased dramatically over the past 12 months due to the increased donor acquisition volume.
Retention rates by Initial Gift Level are comparable to prior years. The $100+ donors and $20-24.99 donors are at the highest level in 5 years. The low figures in FY2010 are most as a result of reduced mailing volume.
The Non-Member Donor program is continuing to improve in acquisition although not as quickly as originally planned. The cultivation of house appeal mailings continue to exceed original estimates. The Legion is still on track to attain our ten year goal of one million active non-member donors.

The demographic profile of the Non-Member Donors provides additional insight on the donors and will be incorporated into additional fundraising strategies including major donor and planned giving opportunities.
## Donor Profile - Demographics

### Gender

<table>
<thead>
<tr>
<th>Gender</th>
<th>% of File</th>
</tr>
</thead>
<tbody>
<tr>
<td>Female</td>
<td>44.32%</td>
</tr>
<tr>
<td>Male</td>
<td>51.19%</td>
</tr>
<tr>
<td>Unknown</td>
<td>2.13%</td>
</tr>
</tbody>
</table>

### Age Range

<table>
<thead>
<tr>
<th>Age Range</th>
<th>% of File</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-54</td>
<td>8.66%</td>
</tr>
<tr>
<td>55-74</td>
<td>41.07%</td>
</tr>
<tr>
<td>75+</td>
<td>50.27%</td>
</tr>
</tbody>
</table>

### Marital Status

<table>
<thead>
<tr>
<th>Marital Status</th>
<th>% of File</th>
</tr>
</thead>
<tbody>
<tr>
<td>Married</td>
<td>44.32%</td>
</tr>
<tr>
<td>Not Married</td>
<td>47.67%</td>
</tr>
<tr>
<td>Unknown</td>
<td>8.01%</td>
</tr>
</tbody>
</table>

### Veteran?

<table>
<thead>
<tr>
<th>Veteran?</th>
<th>% of File</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>12.22%</td>
</tr>
<tr>
<td>No</td>
<td>87.78%</td>
</tr>
</tbody>
</table>

### Religion

<table>
<thead>
<tr>
<th>Religion</th>
<th>% of File</th>
</tr>
</thead>
<tbody>
<tr>
<td>Catholic</td>
<td>24.19%</td>
</tr>
<tr>
<td>Christian</td>
<td>71.40%</td>
</tr>
<tr>
<td>Jewish</td>
<td>3.17%</td>
</tr>
<tr>
<td>Other</td>
<td>1.24%</td>
</tr>
</tbody>
</table>

### Region

<table>
<thead>
<tr>
<th>Region</th>
<th>% of File</th>
<th>% of Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Northeast</td>
<td>20.79%</td>
<td>17.92%</td>
</tr>
<tr>
<td>South</td>
<td>31.56%</td>
<td>37.10%</td>
</tr>
<tr>
<td>Midwest</td>
<td>25.31%</td>
<td>21.68%</td>
</tr>
<tr>
<td>West</td>
<td>22.35%</td>
<td>23.30%</td>
</tr>
</tbody>
</table>

- 0-12 Month Non-Member Donors
- Mostly Males... Conservative lists tend to be more Male
- OLDER!... Higher % Not Married but could be because they are widows
- Christian/Catholic
- Nearly 1/3 are from “South”
- Conservative... based on survey responses
Donor Profile- Financial

<table>
<thead>
<tr>
<th>Income Level</th>
<th>% of File</th>
</tr>
</thead>
<tbody>
<tr>
<td>$0-69,999</td>
<td>57.48%</td>
</tr>
<tr>
<td>$70,000-$99,999</td>
<td>16.89%</td>
</tr>
<tr>
<td>$100,000+</td>
<td>25.63%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Home Owner?</th>
<th>% of File</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home Owner</td>
<td>79.00%</td>
</tr>
<tr>
<td>Renter</td>
<td>6.62%</td>
</tr>
<tr>
<td>Unknown</td>
<td>14.38%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Home Value</th>
<th>% of File</th>
</tr>
</thead>
<tbody>
<tr>
<td>$0-199,999</td>
<td>53.07%</td>
</tr>
<tr>
<td>$200,000-$499,000</td>
<td>24.09%</td>
</tr>
<tr>
<td>$500,000+</td>
<td>5.60%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Length of Residence</th>
<th>% of File</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-9 Years</td>
<td>26.53%</td>
</tr>
<tr>
<td>10-17 Years</td>
<td>19.84%</td>
</tr>
<tr>
<td>18+ Years</td>
<td>53.62%</td>
</tr>
</tbody>
</table>

- Majority have income of less than $70,000... most likely because a high % are retired
  - 393 Donors have a household income over $500,000
- Nearly 80% own their homes with over half of those having been in their houses for 18+ years
  - 681 Donors own a home that is valued at over $1 Million!
What is a Legacy?

1: A gift by will, especially of money or other personal property: a bequest

2: Something transmitted by, or received from an ancestor or predecessor, or from the past
Wills or Bequests

✓ You simply direct, through your will, that The American Legion receive all, or part, of your estate:

✓ Specific Bequest – I leave $5,000 to The American Legion’s Legacy Scholarship Fund.

✓ Percentage Bequest – I leave 10% of my total estate to The American Legion’s Child Welfare Foundation.

✓ Residuary Bequest – After all debts, expenses, and bequests are distributed; I leave the remainder to The American Legion’s Endowment Fund.

✓ Contingent Bequest - In the event my spouse does not survive me, I leave that property to American Legion Charities.
Other Planned Gifts

- Life Insurance
- Charitable Gift Annuity
- Charitable Remainder Trust
- Pooled Income Fund
- Charitable Lead Trust
- Retained Life Estate
- Private Foundation
- Donor-Advised Funds
The mission of the American Legion is to serve veterans, their families and their communities.

Comrades
Programs and services help meet the needs of all veterans.

Community
More than 14,000 local posts put boots on the ground to serve communities around the world.

Country
The largest veterans service organization lobbying daily for veterans in Washington, D.C.

The mission of the association is to facilitate the financial security of its members, associates, and their families through provision of a full range of highly competitive financial products and services; in so doing, USAA seeks to be the provider of choice for the military community.

Going above for those who have gone beyond.
Membership Composition

Eligible Members:

- Active duty military
- National Guard, Selected Reserve
- Officer Candidates
- Military retirees
- Honorably discharged
- Widows/widowers of killed in action
- Members’ families

We are stronger together than we are apart.
MEMBER SATISFACTION (2009)

- Auto Policy Service: 98.3%
- Auto Claims: 97.1%
- Homeowners Policy Service: 97.7%
- Homeowners Claims: 96.4%

USAA achieves a high level of customer satisfaction.

JD Power 2009 Auto Insurance Study
JD Power 2009 Homeowners Insurance Study

USAA was rated more highly for claims satisfaction than most other insurers.

Consumer Reports 2009 Homeowners Insurance Ratings
Industry Leading Insurance

**Homeowners Features:**
- Claims Free discount (up to 10%)
- Water Back-Up coverage
- Identify Theft coverage
- War Zone coverage
- Military Uniforms & Equipment coverage

**Auto Insurance Features:**
- Auto + Home discount (8%-10% each)
- Accident Forgiveness credit
- No fee payment plans
- Deployment Storage discount (up to 90%)
Life, Health & Investments

- Life Insurance
- Annuities
- Healthcare Solutions
- Mutual Funds
- College 529
- Brokerage
- Financial Plans

Full suite of products to fit our members needs at every stage of life.
No commissions

Member-driven design and price

Simple products, no gimmicks

High-performance product suite
  • Universal Life
  • Level Term
  • Whole Life

Simple products, high performance.
Life Insurance: Active Duty

- First to offer insurance while deployed
  - No need to be stateside
  - Expedited process
  - No war-time exclusion

- Military Protection Plus coverage
  - No charge
  - Severe injury payment
  - Coverage if SGLI is lost

- Waiver of medical testing available

- No additional charge for military aviators

We know our Members.
Choose your card from these exclusive American Legion designs.

The American Legion and USAA Bank believe your credit card should work for you. The American Legion USAA Rewards™ World MasterCard® is convenient to use and helps you keep more of your money. What's more, USAA Bank contributes directly to American Legion programs such as Veterans' Affairs and Rehabilitation and Boys' Nation, with every new account opened and each time you make an eligible purchase with the card. No other card works harder for you and The American Legion.

Apply today. Ask for The American Legion Card and specify the name of your preferred card design.

1-877-699-2654 | usaa.com/legioncc
Future Directions

- Department Fundraising
- Non-member fundraising
- Planned Giving
- Major Gifts
- Corporate & Affinity Relationships
- Insurance
- Special Events
Questions?
Contact Information:

Bill Pease, Director
Fundraising Division
(317) 860-3009
bpease@legion.org