

7

MAIL TO: Office of the Attorney General, Registry of Charitable Trusts, P.O. Box 903447, Sacramento, CA 94203-4470

STREET ADDRESS: 1300 I Street, Room 1130, Sacramento, CA 95814, Telephone: (916) 323-5079

WEBSITE ADDRESS: http://caaq.state.ca.us/charities/

COMMERCIAL FUNDRAISER FOR CHARITABLE PURPOSES

2000 ANNUAL FINANCIAL REPORT

(California Government Code Section 12599)

Failure to file annual financial report by January 30 annually for each calendar year of solicitation may result in fines or filing penalties as defined in Government Code Section 12586.1 (Recently enacted).

An annual financial report must be filed for each event for each charity solicited for during the previous calendar year.



Name and Address of Commercial Fundraiser:

CF Number 663

Gift Planning Direct LLC

Name of Commercial Fundraiser

11500 West Olympic Boulevard, Suite 540

Address of Commercial Fundraiser

Los Angeles CA 90064

City, State, and ZIP Code of Commercial Fundraiser

Mail held (on) (from) 7/1/2002

(Type of Activity)

Name and Address of Charitable Organization or Charitable Purposes:

CT No. 9030

F.E.I.N. No. 95-1922279

World Vision United States

34834 Weyerhaeuser Way South

Address of Charity

Federal Way WA 98001

City, State, and ZIP Code of Charity

to 12/31/2002

(Date or dates must be shown)

- 1. REVENUE
A. Cash contributions
B. Entertainment sales or admission charges
C. Sales from products
D. Advertisement sales
E. Membership fees
F. Other sources: (Specify)
a.
b.
c.
d.
G. TOTAL REVENUE

Expect revenues to be collected over the next ten years as a result of estate planning education of member prospects (see attached explanation)
G.

- 2. EXPENSES
A. Fees or commissions
B. Salaries
C. Payroll taxes
D. Employee benefits
E. Cost of merchandise for resale
F. Cost of entertainment
G. Postage
H. Advertising
I. Telephone
J. Rental of equipment
K. Facilities charge
L. Permits
M. Other expenses: (Specify)
a.
b.
c.
d.
N. TOTAL EXPENSES

Please see attached breakdown of expenses.
Ma.
Mb.
Mc.
Md. \$159,788.29
N.

3. Distribution or net to charitable organization or charitable purposes

4. (a) Is any officer, director, partner or owner of the Commercial Fundraiser in any way affiliated with or control, directly or indirectly, the charitable organization for which the Commercial Fundraiser has contracted to solicit?
[ ] Yes [x] No If "yes," complete the following:

Table with 3 columns: Name of officer, director, partner or owner of Commercial Fundraiser; Name and address of charitable organization; Relationship of officer, etc. To charitable organization.

(b) For each affiliation identified in 4(a), attach copy of the contract between the commercial fundraiser and the charity.

Under penalties of perjury, I declare that I have examined this report, including accompanying documents, schedules and statements, and to the best of my knowledge, true, correct and complete.

Signature of Commercial Fundraiser: Thomas Siegel, Managing Partner, 1/10/03
Signature of Charitable Organization: Marc Howard, Sr. Vice President, 1/23/03

RECEIVED  
FEB 10 2003  
AGENCY OF THE DISTRICT OF COLUMBIA

402120





## Gift Planning Direct

### **Gift Planning Direct Bequest Cultivation Program How Revenue Figures are Estimated**

Gift Planning Direct's **Bequest Cultivation Program** is a carefully planned and integrated approach, designed to educate existing charitable donors about personal estate planning and cultivate their long-term support. The program has nine steps or "points of contact" that include personalized letters, very specific and easily understood educational materials, and conversations with specially trained telephone representatives. Each point of contact is meant to educate, as well as personalize, the relationship between donor and organization.

The goals of the program are as follows:

1. To inform charitable donors how important it is to have a Will or Living Trust (over 60% of the population does not have a Will) and then assist them in creating or improving their plan so that it accurately reflects their personal goals and wishes.
2. To help charities identify existing donors committed to, or interested in learning more about, including a gift to the institution in their estate plan.

Though it's impossible to know for sure how much value charities will realize from our efforts (in part, because we don't know when donors will die), the estimates included on the enclosed Revenue & Expense Report are based on the following:

- Repeated studies (Gallop, National Family Opinion Research Center, National Committee on Planned Giving and our initial test results indicate that each participating organization will receive between 35 and 200 bequest commitments from every 5,000 prospects they introduce into the Bequest Cultivation Program. (Results vary based on the length of time each donor has been contributing to the institution and the ages of the prospects introduced into the program). If the average bequest to each organization is based on the U.S. national average of \$21,000, the net present value from this program over the next ten year period should be between \$735,000 and \$4,200,000 per 5,000 prospects.
- In addition, approximately only one out of six individuals will inform an organization of an intended bequest gift. So, an additional \$3.5 - \$21 million in bequest revenue should occur from each segment of 5,000 prospects as a result of our efforts (if national research on the matter holds true).

Gift Planning Direct  
1900 Avenue of the Stars  
Suite 2350  
Los Angeles, CA 90067  
Telephone 310 229-9732  
Facsimile 310 788-0114