Household Assets

National composition of household wealth for Wealthiest 1%, Next 19%, and Middle 60%
UNCG
Vanguard Alumni Never a Donor or No Gift in Last 10 Years
Gift Capacity Ratings

<table>
<thead>
<tr>
<th>Gift Capacity Rating</th>
<th># of Alumni</th>
</tr>
</thead>
<tbody>
<tr>
<td>$5M+</td>
<td>2</td>
</tr>
<tr>
<td>$1M - $4.9M</td>
<td>5</td>
</tr>
<tr>
<td>$500K - $999K</td>
<td>9</td>
</tr>
<tr>
<td>$250K - $499K</td>
<td>56</td>
</tr>
<tr>
<td>$100K - $249K</td>
<td>251</td>
</tr>
<tr>
<td>$50K - $99K</td>
<td>259</td>
</tr>
<tr>
<td>$25K - $49K</td>
<td>410</td>
</tr>
<tr>
<td>less than $25K</td>
<td>909</td>
</tr>
</tbody>
</table>
UNCG
Vanguard Alumni Donor (160 have made planned gift)
Gift Capacity Ratings

<table>
<thead>
<tr>
<th>Gift Capacity Rating</th>
<th># of Alumni</th>
</tr>
</thead>
<tbody>
<tr>
<td>$5M+</td>
<td>5</td>
</tr>
<tr>
<td>$1M - $4.9M</td>
<td>32</td>
</tr>
<tr>
<td>$500K - $999K</td>
<td>26</td>
</tr>
<tr>
<td>$250K - $499K</td>
<td>65</td>
</tr>
<tr>
<td>$100K - $249K</td>
<td>317</td>
</tr>
<tr>
<td>$50K - $99K</td>
<td>331</td>
</tr>
<tr>
<td>$25K - $49K</td>
<td>650</td>
</tr>
<tr>
<td>less than $25K</td>
<td>925</td>
</tr>
</tbody>
</table>
UNCG
All Planned Gifts by Year - Face Value Amounts

FY 2003: $3.1 Million
FY 2004: $2.3 Million
FY 2005: $8.4 Million
FY 2006: $12.1 Million
FY 2007: $13.8 Million
FY 2008: $7.9 Million
FY 2009: $2 Million
FY 2010: $6.2 Million
FY 2011: $6.6 Million
FY 2012: $4.7 Million
FY 2013: $2.9 Million
FY 2014: $3.1 Million
FY 2015: $3 Million
UNCG
Revocable Gifts by Year - Face Value Amounts

FY 2003: $2.5 Million
FY 2004: $2.1 Million
FY 2005: $7.0 Million
FY 2006: $10.1 Million
FY 2007: $9.4 Million
FY 2008: $6.3 Million
FY 2009: $1.5 Million
FY 2010: $5.1 Million
FY 2011: $4.6 Million
FY 2012: $4.2 Million
FY 2013: $950K
FY 2014: $2.9 Million
FY 2015: $2.5 Million
UNCG
Irrevocable Gifts by Year - Face Value Amounts

- FY 2003: $537K
- FY 2004: $220K
- FY 2005: $1.4 Million
- FY 2006: $2.1 Million
- FY 2007: $4.4 Million
- FY 2008: $1.6 Million
- FY 2009: $1.1 Million
- FY 2010: $501K
- FY 2011: $2.1 Million
- FY 2012: $497K
- FY 2013: $1.9 Million
- FY 2014: $185K
- FY 2015: $501K
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Number of Planned Gifts by Year / All Types

Irrevocable
Revocable
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Current Revocable Planned Gifts

- 86% Bequest Intentions
- 3% Life Insurance Beneficiary
- 11% Retirement Plan Beneficiary
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Current Irrevocable Planned Gifts

26% Charitable Gift Annuities
69% Charitable Remainder Trusts
2% Pooled Income Funds
1% Life Insurance Beneficiary
2% Life Estates Reserved