



BREAKTHROUGH
PHILANTHROPY, INC.

...taking fundraising to the next level

212-505-6171

lgreif@breakthroughphilanthropy.com

www.breakthroughphilanthropy.com

YOUR PLANNED GIVING SPECIALIST

ABOUT OUR PRESIDENT



Lorri M. Greif, CFRE, president of Breakthrough Philanthropy, Inc., has more than two decades of experience in creating and implementing successful major gift and planned giving campaigns for local and national mid-sized nonprofits. She has the knowledge of both a seasoned nonprofit fundraiser and a consultant.

She has unique experience in building or re-working fundraising campaigns from "the ground up". As the National Director of Planned Giving for of Women's American ORT (now ORT America, Inc.), Lorri implemented a national planned giving marketing campaign that helped to grow their planned giving society to more than 1,000 members. She also helped to create ORT America's Diamond Ladder, which brings in millions of dollars in new and increased major gifts. As the first Chief Development Professional for HIAS, Inc., she worked to change the fundraising environment to individual support from government funding and created a major gift and planned giving program after accelerating their annual campaign.

She additionally helped to create or reinvigorate planned giving campaigns for such organizations as the Police Athletic League, Inc. (PAL), Friends of the IDF, YIVO Institute for Jewish Research, and Crohn's and Colitis Foundation of America (CCFA), to name just a few.

Lorri serves on the board of Women in Development (WID). She is a member of the Association of Development Officers (ADO), the Planned Giving Group of Greater New York (PGGNY), the National Council on Planned Giving (NCPG), the American Council on Gift Annuities (ACGA), the National Board of Gift-Planning Consultants for Planned Giving MENTOR™, and the Program Committee of the Association of Fund Raising Professionals (AFP).

PLANNED GIVING

Planned giving can:

- Supplement annual giving
- Enhance donor loyalty
- Increase the size of current gifts
- Help secure the future

For more than a decade, the planned giving professionals at Breakthrough Philanthropy have been helping nonprofits create, build and improve planned giving programs. After our careful initial assessment, your organization receives a fully customized marketing strategy and the materials needed to implement and grow your program. Additionally, ongoing training and support are provided to ensure a highly professional and successful campaign. Your development staff will learn:

- How to identify a planned giving prospect
- How planned giving vehicles work
- How to present the right vehicle to the right prospect – in the clearest way
- How to integrate planned giving with other fundraising goals
- And more...



CAMPAIGN ASSESSMENT, PLANNING & IMPLEMENTATION

Meticulous planning is essential to the successful outcome of any new fundraising activity. Breakthrough Philanthropy provides a thorough assessment process geared to determining organizational readiness for planned giving and the correct approach. Based upon the information obtained, recommendations are made for a fully customized marketing strategy. Additionally, Breakthrough Philanthropy will be there every step of the way providing guidance and support to ensure that your program is a success.



STAFF & VOLUNTEER TRAINING

Readiness to launch a new campaign often involves the learning of new ideas and skills. Breakthrough Philanthropy provides teaching and coaching to development professionals, volunteer committee members, and board members. You and your leadership will gain the knowledge, understanding and new skills required to empower your planned giving campaigns.

TESTIMONIALS

Lorri Greif of Breakthrough Philanthropy, Inc. has single-handedly educated Board Members and staff about the intricacies of planned giving, inspiring commitment and involvement in this program. Lorri's professional and financial knowledge coupled with her warm and friendly manner have ignited a spark in our planned giving and fundraising efforts.

*– Jami Landi, Director of Development
The Police Athletic League, Inc.*

Thanks to Breakthrough Philanthropy, Inc., YIVO's planned giving program has taken on new life with significant increases in charitable gift annuities and membership in our Gaon Society. Lorri Greif's expertise in this area and her assistance with major gifts have made it possible for YIVO to expand our cultivation efforts and donor gifting opportunities.

*– Ella Levine, Director of Development &
External Affairs
YIVO Institute for Jewish Research*

Breakthrough Philanthropy, Inc.'s Lorri Greif provided invaluable assistance and counsel in starting the Friends of the IDF planned giving program. Our campaign today is very successful and we and our Israeli soldiers can always be grateful to Lorri for her counsel, integrity, and hard work on our behalf.

*– Barbara Harris, Director of Operations
Friends of the IDF*