



Empowering Research And Analysis

Transfer of Wealth Analysis

What is it?

Transfer of Wealth analysis (TOW) combines secondary data to create a scenario based model to help a community understand the magnitude of local wealth that may transfer across generations in the next 10, 20 and 50 years. Nationally, \$15 trillion is likely to transfer between generations in the next 20 years.

What value can it provide?

TOW provides insight into both the magnitude and timing of the wealth transfer opportunity in a community, region or state. It has provided a powerful call to action for community foundations interested in capturing some portion of this wealth for community betterment. Building a pool of local development resources encourages a more proactive approach to economic development and wealth building.

How can you realize this value?

The Center has conducted over 40 TOW studies in the U.S. for partners in rural and urban communities. These studies are flexibly designed for each unique landscape, whether a single community, regional or statewide foundation. While single community studies are valuable, statewide studies encourage community foundations to collaborate and share the results as one voice. In all cases, we follow a similar process that engages foundation staff and board members. In addition, we recruit technical advisors from the broader community to help us understand the community, refine our assumptions and create the strongest, most credible TOW scenario. This local engagement is one of the more valuable parts of the process.

What does it cost?

The cost of TOW varies by geographic coverage and level of engagement requested. A study with more limited electronic engagement and no travel can cost as little as \$2,000. A study with greater engagement including in-person presentations can cost up to \$60,000. We are happy to talk through your aspirations and customize a proposal that fits your needs and budget.

Who is already using these resources?

Two of many examples: The South Dakota Community Foundation used TOW to strategically engage partners in communities and to target places where the giving potential was high. The result was tremendous growth in the foundation's endowment over time. Central Florida Foundation uses TOW to help the business community understand the importance of capturing philanthropic capital along with venture and angel capital to build economic growth in a region. Please visit our web site for many more examples of community impact.

For More Information

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www.energizingentrepreneurs.org/solutions/community_development_philanthropy.html