

Summary of Data for Charitable Estate Planning from Health and Retirement Study (1995-2006) based on articles by Russell N. James III, J.D., PH.D.

Group Description	Number of Individuals	Charitable Intent/Outcomes
Total group interviewed (over age 50 Americans)	26,000	5% indicated charitable estate intent while alive
Total deceased during study time period (1995-2006)	6,640	4.5% indicated charitable estate intent (298 people)
Total deceased with charitable estate intent	298	121 or 122 estates actually distributed to charity (40.9% success rate – <u>59.1% failure rate</u>)
Total deceased with charitable estate intent where there was actually an estate	277	22 of the 298 with charitable bequest intent didn't even have wills probated or trusts administered (7.7% failure rate)
Total deceased with surviving spouse with charitable estate intent	136	97 of these estates did not distribute to charity (71.5% failure rate) – possible future bequests though
Total deceased with intended charitable estates without surviving spouse	162	80 of these estates did not distribute to charity (49.4% failure rate)

Note: These numbers were taken from two articles by Russell N. James III, J.D., PH.D., neither of which I have permission to republish. I had to back into some of these figures since he only showed percentages on much of the data. Interestingly, when applying his rates of failure to the total numbers, quite often it would not give me a whole number. Hard to understand how that happened.