

A Guided Journey of Impactful Reflection

Give your supporters an elevated review of their estate plan

Many supporters already have wills and trusts, but those documents often focus only on the transfer of assets – not on the passions, values, and vision behind them. Without that clarity, even the best-laid plans can leave families unsure and often leaves nonprofits overlooked.

Periscope Path changes that. It's a guided journey of reflection that walks with your supporters and their trusted advisors to align their estate plan with what matters most to them, while giving your organization a powerful way to deepen relationships and inspire lasting generosity.



Why Periscope Path?

Your supporters want their legacy to mean more than “who gets what.” Periscope Path gives them the space and guidance to:

- Reflect on their story, values, and vision for impact.
- Ensure alignment between their estate plan and what matters most.
- Connect their generosity with the people and causes closest to their heart.

Why It Matters for Your Mission

When supporters gain clarity about their legacy, they are more likely to take meaningful action. With Periscope Path, your organization benefits from:

- **Deeper supporter engagement** rooted in trust and shared values.
- **Increased pipelines** for both planned and major gifts.
- **Valuable insights** on supporter engagement and activity.

What It Means for Your Supporters

Periscope Path is a confidential process, offered at no cost to your supporters. Each participant walks away with a personalized roadmap they can share with their trusted advisors, giving them:

- 1** Clarity about their values and goals.
- 2** Confidence that their plans reflect what matters most.
- 3** Peace of mind knowing their legacy is secure and impactful.

Periscope Path, provided exclusively by Thompson & Associates, draws on over three decades of expertise and more than 12,000 families served. Our technical experts help supporters align their passions with their plans, providing clarity and peace of mind. Trusted by nonprofits nationwide, our process has generated over \$9B to charity.