



TEN SIMPLE THINGS TO PROMOTE PLANNED GIVING

Marketing Planned Gifts – Focus on:

- the **relationship**
- recognizing the **special partnership** with
- **longer term donors & volunteers**

Purpose – Focus on:

- Confirming **Mission & Values Fit**
- **Educating** about gifts
- **Saying “thank you”**

1. *Use Volunteers to Help Share the Story*

Recruit one Board member, former member or long-time respected volunteer to support & help with efforts

Exs.:

Ask a Board member who’s made a planned gift to be featured or to speak

Ask attorney/Financial Services Board member to speak

2. Promote Planned Giving at Board Meeting

Always start here with Planned Giving message

Exs.:

Ask a Board member who's made a planned gift to speak

Ask attorney/Financial Services Board member to speak

3. Print Donor Stories in Agency Newsletter

Exs.:

Use a bequest to talk about planned giving to your agency

Highlight a Board member's gift

4. Promote Recognition of Planned Gifts

Exs.:

Plaque presentation for bequest gift

Reception w/speaker on financial/charitable giving/mission update inviting long time donors & Vols.

5. Use Vendors for E-marketing, PG websites & email newsletter to Board, Volunteers & top donors

Inexpensive & easy to implement

Exs.:

Gift Annuity Calculator

E-Newsletter & Brochures

6. Create Planned Giving Insert Slip

Promote Bequests, CGAs, Endowments

Exs.:

Use in Newsletter for response device

Use in Receipt letters

7. Include Planned Giving in Direct Mail Appeals

Exs.:

Include a statement to remember your organization in their estate plan

Include a checkbox on the response device

8. Purchase basic Planned Giving brochures from vendors & promote their availability

Exs.:

Set out at Volunteer gatherings & meetings

Announce & set out at Board meetings

9. Promote “Endowing Annual Gift”

Direct mailing approach for less involved donors

Exs.:

Start of the year mailing about replacement of gift w/response card for more information

10. Promote Charitable Gift Annuities

Shows you can accept more sophisticated gifts

Exs.:

Use post card

Simple brochure with rates

Promote rates in Newsletter at least 2x a year