



Your Partner in Raising Funds

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18 Planned Giving Tips



1. The planned giving golden rule is:

EVERYONE IS A TARGET

Regardless of donation size.



2. People will only leave you a bequest if you ask!



Make sure to **ASK!**

3. There are cost-effective ways to send information on bequests:

newsletters, welcome packs, thank you notes, and on BRC's or even on BRE's.



4. You'd be surprised how many \$20 donors leave 6 and 7 figure bequests!

They may be small now, but they're valuable!



5. Ask donors who have designated bequests if you can feature them in a newsletter.

This will compel others to join your legacy society.



6. Give your legacy society a name!

It makes people feel special and a part of a larger community of change makers.



7. List your legacy society donors in your annual report.

It shows appreciation and will motivate others to join.



8. Use a matching gift to acquire new bequest pledges.

For example: if we receive 100 bequest pledges in the next month, a donor will give us \$100,000.



9. In April, during tax time, send postcards urging donors to consider

you in their estate planning.



10. Create a special web page for legacy society donors.

Include important information and guidance to include your charity in their estate plans.



11. List property, stocks, insurance policies and other assets as viable options for transfer.

The tax benefits to donor estates are significant.



12. Feature a family of two or three generations that has pledged to leave you a bequest on the web page or in a newsletter.



13. Thank family members of recent bequest donors, and thank them personally.

Cultivate these relationships and they may later include you in their estate planning.



14. Most often, people will not inform you about their estate plans.

If they do, keep the communication going.



15. Repetition is key to getting people to leave you a bequest.

Remind them frequently.



16. Surviving spouses who control the estate may not feel the same loyalty that the deceased donor did.

Communicate with donors for at least **5** years after they lapse.

17. Legacy society members should receive premiums or benefits, such as:



Membership certificates or pins, invitations to events, or webinars.

18. When a donor joins your legacy society, they should receive an appreciation call from the Executive Director.



Raising Funds to Change the World