# DMAW Breakfast with an Expert (or two)

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### **Getting Acquainted**

Tell us about your organization's planned giving program.

Options:

- 1) We don't have one and need to get started
- 2) We have a program but it's new or needs further development
- 3) We have a strong, established program; but I need new ideas

## The Wealth Transfer is Here

- In 2019, US Charities received \$43.21 Billion via gifts by bequest (Giving USA 2020)
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- Contributions to Charity
  - Individuals: 69%
  - Foundations: 17%
  - <u>Bequests: 10%</u>
  - Corporations: 5%



# What is Planned Giving?

- Planned Giving is a broad term used to describe any kind of gift that is made with something other than cash, check or stock transfer.
- Planned gifts make up some of the largest gifts any organization receives, with a national average of \$55,000 per gift.
- Planned gifts have many benefits to donors.
  - Most do not cost anything now
  - Most allow a donor to change her mind at any time
  - Most provide valuable tax benefits
  - All allow donors to establish their legacy

## **Types of Planned Gifts**



### **Identifying Planned Giving Prospects**

Consistent giving over years	Affinity (alumni, patient/family, participant)	Presence of donor supplied email
Multi-channel responders	Recruiters	Evidence of engagement (surveys, events volunteer/giver)

## **Incorporating Direct Marketing Best Practices**



Segment Segment for Audience



**Simplify** Simplify the Message



**Offer** Provide One Clear Offer



**Reply** Always Include a Reply G

Repeat Market Consistently

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City of Hope ⊘
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So many of us have been touched in some way by cancer and other serious illnesses. Including a gift in your will or trust can create a legacy of hope for future patients and their loves ones.

Exploring whether a gift in your will for City of Hope is right for you is just a click away. Learn more: https://bddy.me/3dEv.lpk



🖒 Like  $\bigcirc$  Comment  $\Rightarrow$  Share

009 47 2 Shares O Write a comment... Q GF 😳 ↑ 🖶 (\*\*\*) (  $\Diamond \equiv$  In his late 50s, Mark had heart palpitations, was often short of breath and tired easily. He chalked it up to aging. But it was much more. It was aortic stenosis. Read Mark's story. #ValveDiseaseDa http://spr.lv/6182

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Your legacy? Making sure she								
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### **Thank You**

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