

DMAW

Breakfast with an Expert (or two)

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Getting Acquainted

Tell us about your organization's planned giving program.

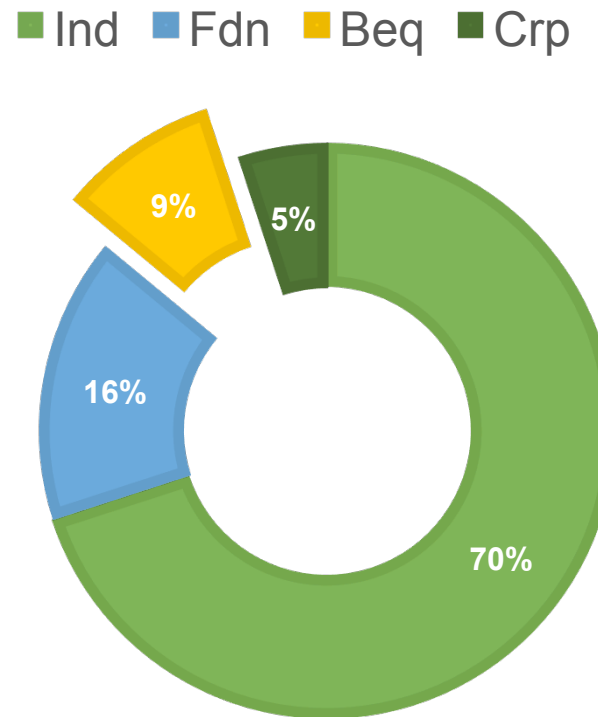
Options:

- 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
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The Wealth Transfer is Here

- In 2019, US Charities received \$43.21 Billion via gifts by bequest (*Giving USA 2020*)

- Contributions to Charity
 - Individuals: 69%
 - Foundations: 17%
 - **Bequests: 10%**
 - 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

Gifts That Cost You Nothing Now

Bequests

Beneficiary
Designations

CGAs

Trusts

Gifts That Pay You
Income for Life

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



Target

Target Appropriately



Segment

Segment for Audience



Simplify

Simplify the Message



Offer

Provide One Clear Offer



Reply

Always Include a Reply



Repeat

Market Consistently



Thank You

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