

Planned Giving Marketing & Donor Communications

Webinar Series: Session 2

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20+ years

Planned Giving Marketing & Donor Communications

Presentation Created & Developed by Vicki Brummond, MBA | © 2022



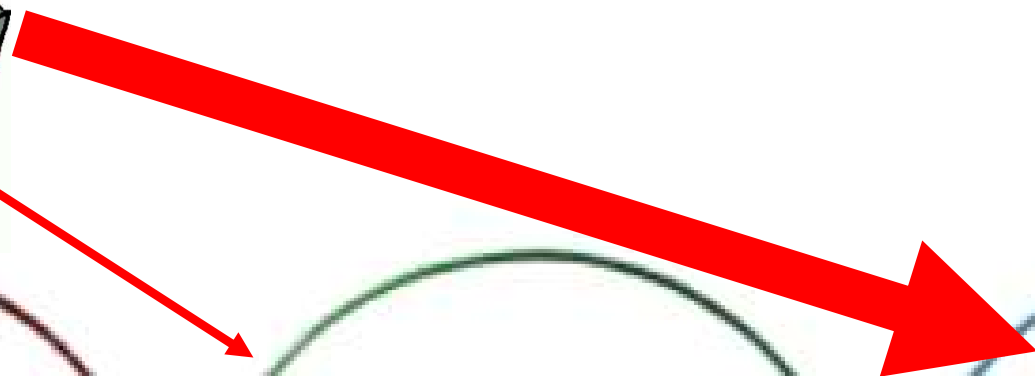
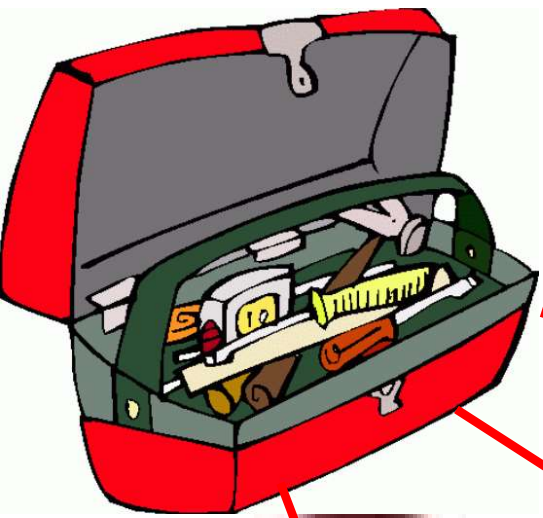
- 
- **Why Planned Giving**
 - **Marketing Goals**
 - **Keys to Success**
 - **Strategies & Tactics**
 - **Talking with Donors**
 - **Key Takeaways**

What We'll Cover

- **Donors**
- **Charities**



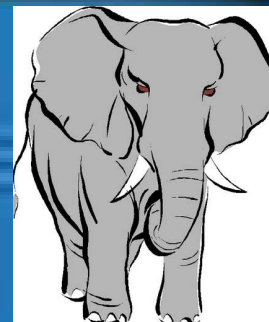
WHY Planned Giving?



Life Income Gifts

Non-Cash Gifts

**Gifts via
Will, Trust, &
Beneficiary
Designation**



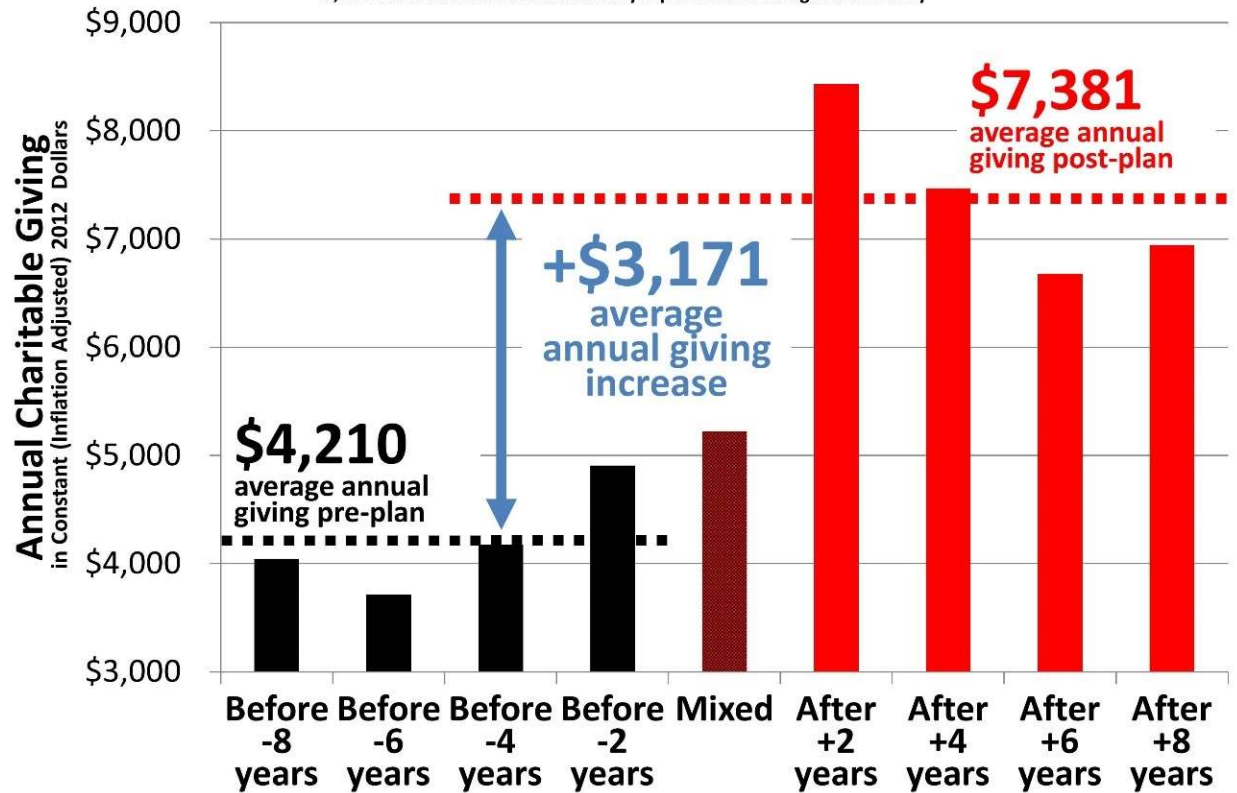
Giving Options



Either / Or ? **No**

Giving Before and After Adding Charitable Beneficiary to Estate Plan

9,439 observations from a nationally representative longitudinal study



Source: Dr. Russell James

Planned “Legacy” Gifts increase current giving



Educate,
Inspire, Engage



Generate



Uncover

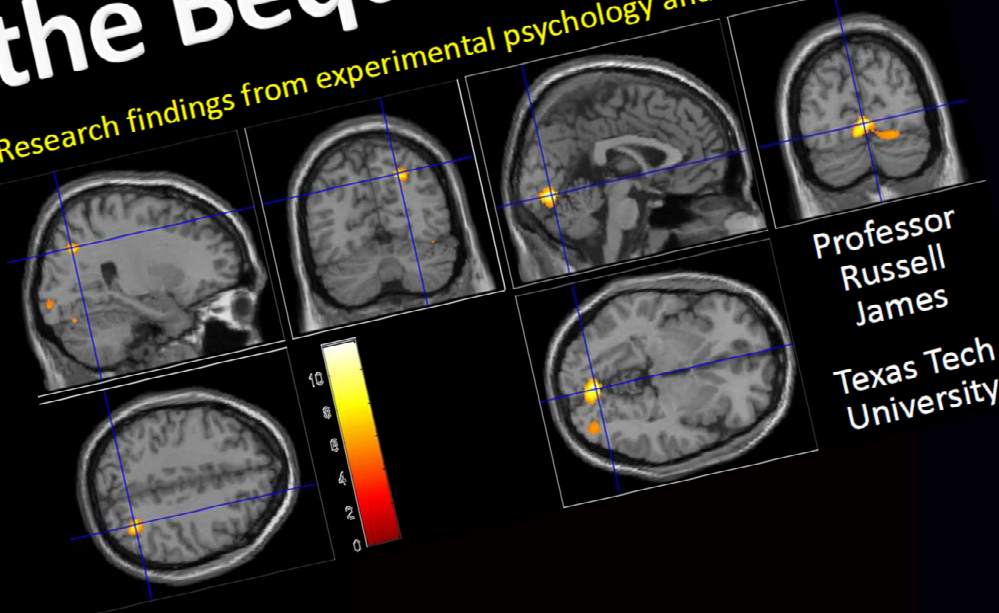
Marketing Goals



Keys to Success

Inside the Mind of the Bequest Donor

Research findings from experimental psychology and neuroimaging



WHAT - You Say Matters | Messaging

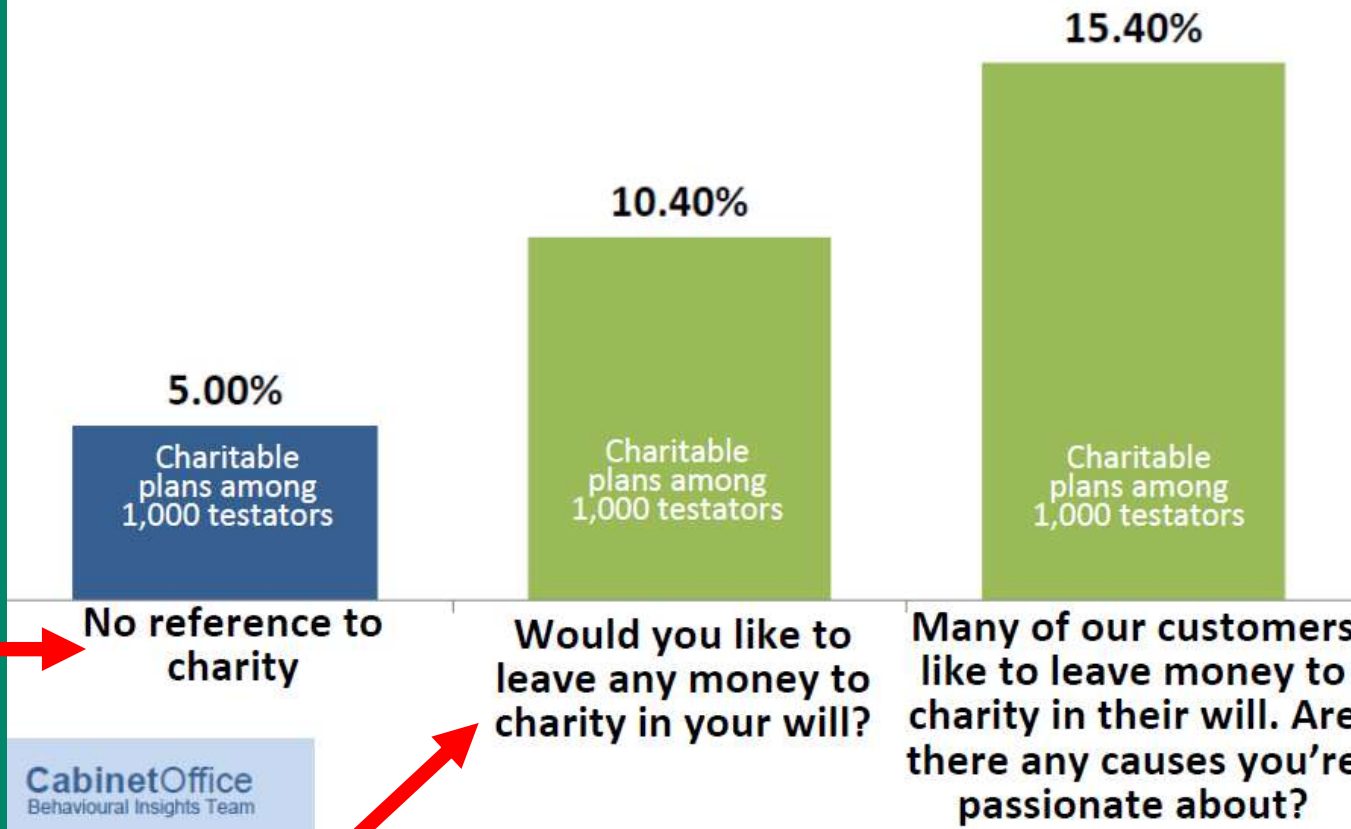
Philanthropy is a **SOCIAL** act using the mechanisms of **FAMILY** bonding



Source: Dr. Russell James

Social Norming

Charitable bequest decisions are often unstable and easily influenced



Source: Dr. Russell James

Power of Social Norming



Storytelling

What are your hopes for the continued and unfolding story of World Vision's impact and your part in it?

Have you ever considered leaving a gift to World Vision?

Yes

No

I have put World Vision in my will

I might consider it in the future

World Vision



Share your story with us!

Complete this form and return it to us, and if you wish, we'll send you a special gift for your personal library with our thanks.

We want to hear about you.

How did you first become involved with World Vision?

What significant events and/or people influenced your desire to help others?

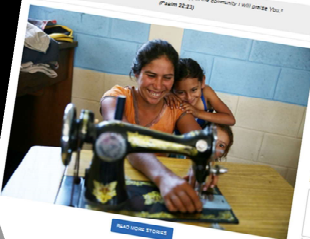
How has supporting this ministry made a difference in your life?

(continued...)



FOOD FOR THE POOR
Saving Lives... Transforming Communities... Renewing Hope

TELL YOUR STORY OF HELPING THE POOR



YOUR STORY IS IMPORTANT TO US!
We are eager to learn more about you, your experiences, and the impact you've made. Each story is a powerful testimony to our work and the lives we've touched. We'll share your story with our community and use it to inspire others to join our mission.

1. How did you become involved with Food for the Poor?


2. Why is your partnership with Food for the Poor important to you?

3. What moment, story, mission, or event have you experienced that influenced your support of our mission?

4. Please share with us the future you envision for the poor through your partnership with Food for the Poor.

5. Is there anything else you would like to share? Perhaps your hope to share how God's work is present in your life.

Gathering Stories



Easy ways you can make a lasting impact



CREATE YOUR LEGACY

Gifts that Cost You Nothing Now

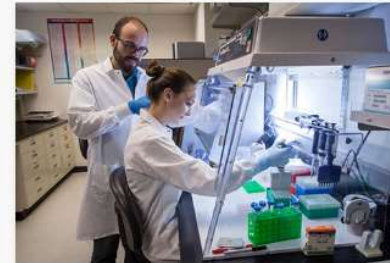
Create a legacy that powers breakthrough research at Fred Hutch and will help cure cancer faster — and be remembered as a cancer fighter.



ACHIEVE YOUR GOALS

Gifts that Pay You Income

Establish your legacy with Fred Hutch and achieve financial security.



TAX-SAVVY GIVING

Gifts that Reduce Your Taxes


Reduce your taxes while supporting our work preventing, diagnosing, and treating cancer and related diseases.



YOU HAVE OPTIONS

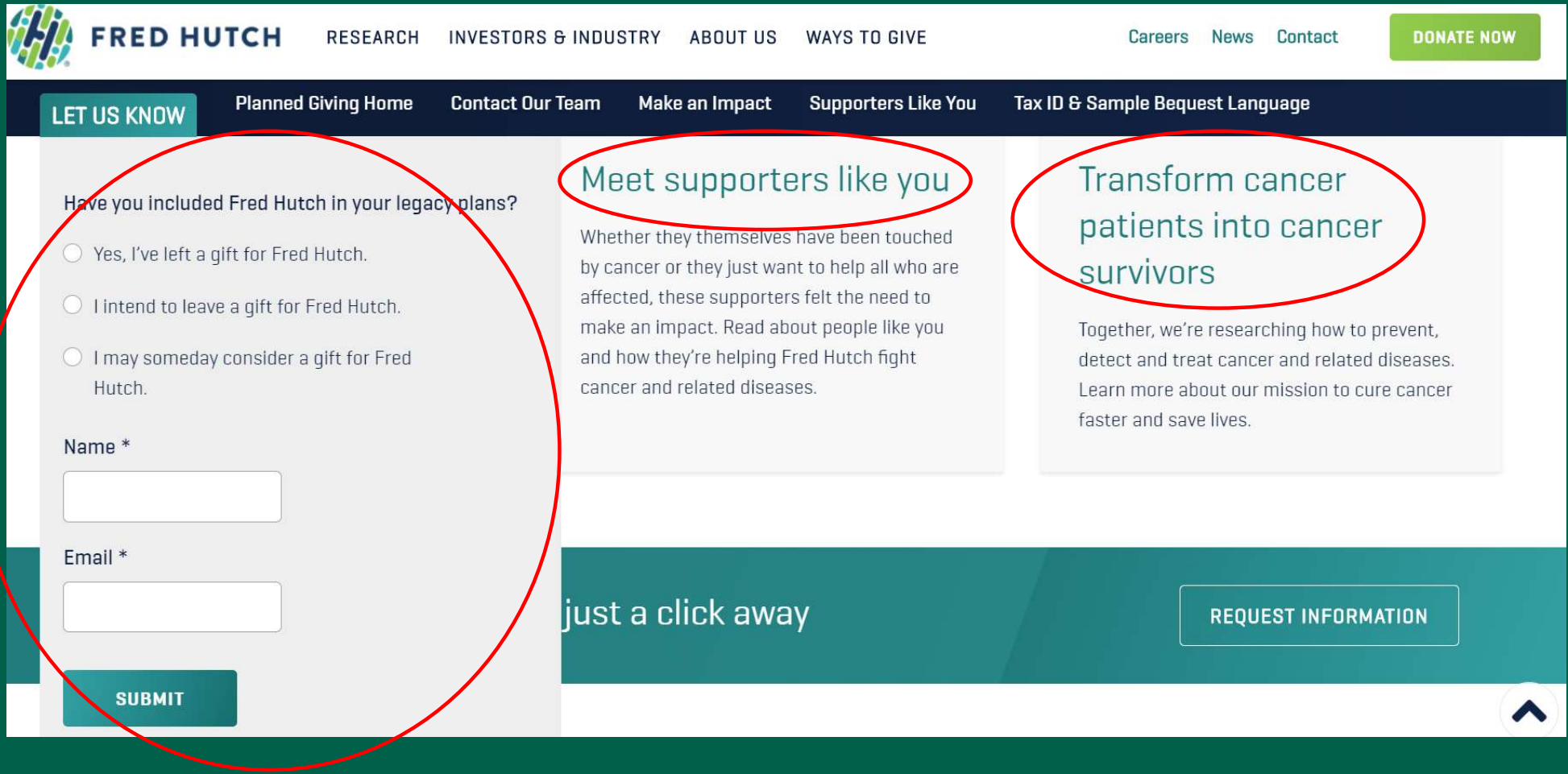
Other Ways to Give

Learn about the many ways you can help Fred Hutch transform cancer patients into cancer survivors.



“be remembered as a cancer fighter”

Messaging



FRED HUTCH RESEARCH INVESTORS & INDUSTRY ABOUT US WAYS TO GIVE Careers News Contact [DONATE NOW](#)

LET US KNOW Planned Giving Home Contact Our Team Make an Impact Supporters Like You Tax ID & Sample Bequest Language

Have you included Fred Hutch in your legacy plans?

- Yes, I've left a gift for Fred Hutch.
- I intend to leave a gift for Fred Hutch.
- I may someday consider a gift for Fred Hutch.

Name *

Email *

SUBMIT

[Meet supporters like you](#)

Whether they themselves have been touched by cancer or they just want to help all who are affected, these supporters felt the need to make an impact. Read about people like you and how they're helping Fred Hutch fight cancer and related diseases.

[Transform cancer patients into cancer survivors](#)

Together, we're researching how to prevent, detect and treat cancer and related diseases. Learn more about our mission to cure cancer faster and save lives.

just a click away [REQUEST INFORMATION](#)

[↑](#)

Messaging



2organize

1

2

3

4

5

6

Met vriendelijke groet,

Hans Janzen
Algemeen Directeur

Participant: 100%

1000 views

Een goede keuze voor de meest gevoelige huid.

...additionally adds moisture

...absorbency natural-bleed cotton

...soft, extra thick, gel-free protection

...sensitive skin. The chlorine-free materials and

...is non-toxic and non-irritating. Clinically

...recommended for babies with allergies

...skin.

TM

If you are not satisfied with the baby look and operation, you will get your money back. Read more about our look free guarantee at www.baby.com

HOW – You Say it Matters | Creative/Design



WHO – You Say it to Matters | Audience



“Ride-Along”



“Dedicated”

WHERE – You Say It | Strategies & Tactics

Leverage

Current Touch Points:



“Ride-Along”



HUNGER IN WA

HOW WE FIGHT HUNGER

NEWS & EVENTS

TAKE ACTION

VOLUNTEER

DONATE

- Give Now
- Give Food
- Privacy Policy
- Virtual Food Drive
- Name Us In Your Will
- Holiday Greeting Cards
- Corporate Sponsorships
- Workplace Giving
- Donate a car or vehicle
- Donate Stock
- Events

Hunger Stops Here

Northwest Harvest is Washington's own statewide hunger relief agency. Our mission is leading the fight for hungry people statewide to have access to nutritious food while respecting their dignity and promoting good health. Our vision is ending hunger in Washington.

Donate Now

HONORING RUTH VELOZO

"LIFE'S PERSISTENT QUESTION ARE YOU FOR OT DR. M.L.

CELEBRATING NORTHWEST HARVEST'S SODO COMMUNITY MARKET
Be a Lasting Part of SODO Community Market!

Purchasing a brick helps ensure we have the resources to continue offering life changing programs throughout Washington.

Corporate Web Site



EVERY GIFT COUNTS

Create a gift through your will, trust or other legacy gift and make an essential investment in the healthy future of our community.



Banner Ads

GIFT MATCHED DOLLAR FOR DOLLAR

YOUR GIFT OF CLEAN WATER CHANGES THE LIVES OF CHILDREN

So many children are waiting and suffering because they lack clean, safe water in their communities. You can help change that today. **Your gift is matched dollar for dollar to double in impact.** Your gift of:

- \$250 can provide a family of five with clean water
- \$500 can provide ten children with clean water
- \$690 can provide hand-pump maintenance training and toolkits for three community volunteers

Your gift is matched dollar for dollar to double in impact today.

worldvision.org/GiveCleanWater

When you give gifts of appreciated stock, real estate, or business interests, you can maximize your tax savings while increasing your positive impact on children's lives. To learn more, please contact your World Vision representative or call our Gift Planning team at 1.800.436.5753

Yes, double my gift to help provide clean water for children.

I am enclosing: \$ _____ \$250 \$500 \$690

World Vision
 P.O. Box 7020, Tacoma, WA 98402-0020
worldvision.org
[WorldVision](https://www.facebook.com/WorldVision)

Account # 888888
 Service Code 230750

Thank You! You will receive a receipt for income tax purposes. Please make your check payable to:

WORLD CHAIR
 440 PIONEER
 CARLSBAD, CA 92008-2214

Your World Vision Representative
 Leslie Loran 1.800.577.4620
loran@worldvision.org

XXXX5450170015103280762010000000000100000029000L

Direct Mail Appeals



Magazines & Newsletters

“I want to leave a legacy . . .”
Delores
 (donor since 1990)

“I want to leave a legacy that makes a statement about who I am as a person,” says Delores Thomas. For Delores, this means continuing her lifetime of giving by including organizations like World Vision in her will.

“There is no better way to bless others than to give of ourselves in every way possible,” she explains.
(Read more of Delores’s story inside.)

World Vision®

“We’re doing something that will last beyond ourselves.”
Pat and Donald
 (donors since 2000)

“We want to be sure that when we leave this earth, the things we’ve accumulated and accomplished have an ongoing impact,” share Pat and Donald Erickson.

By making World Vision a beneficiary of their charitable remainder trust, the couple is ensuring that their legacy of generosity will continue. “We know it’s a good choice,” they add.
(Read more of Pat and Donald’s story inside.)

World Vision®

ourlegacy

Testimony Inserts



- **Direct Mail**
- **Email**
- **PG Website**
- **Brochures**
- **Events**
- **Newsletter**
- **Phone Program**

“Dedicated”

Planning Matters

10 Ways to Make Your Giving
Easier and More Cost-Effective



But the man of honor makes good plans, and he stands
for what is good. —Isaiah 32:8 (NLV)

Brochures

Charitable IR
Make a distrib
without incur
lands and w
income ear

- To Qual**
- You m
 - Trans
 - accr
 - Gi

Be
Q

Give Wisely

*Put your IRA
to work for nature—
and save on taxes too.*

Learn how ...



© James Carlton Jr.

Postcards

"I grew up camping in local and national parks, and early on I learned that nature is something we must protect."



Image courtesy of Beth Salerno and Tod Ramseyer

That's why my husband and I decided early on to create a plan to ensure that our money goes to the causes we care about most. We named The Nature Conservancy as a beneficiary of our life insurance policies and our retirement plan. The process wasn't hard—it was just a matter of knowing what we cared about and putting it down on paper. Having a plan ensures that those we leave behind aren't burdened and that our hard-earned savings will be directed toward people and causes we love."

Beth Salerno, Ph.D., and Tod Ramseyer, Ph.D.

Make A Gift Through Your Will, Trust, Retirement Accounts, Or Life Insurance

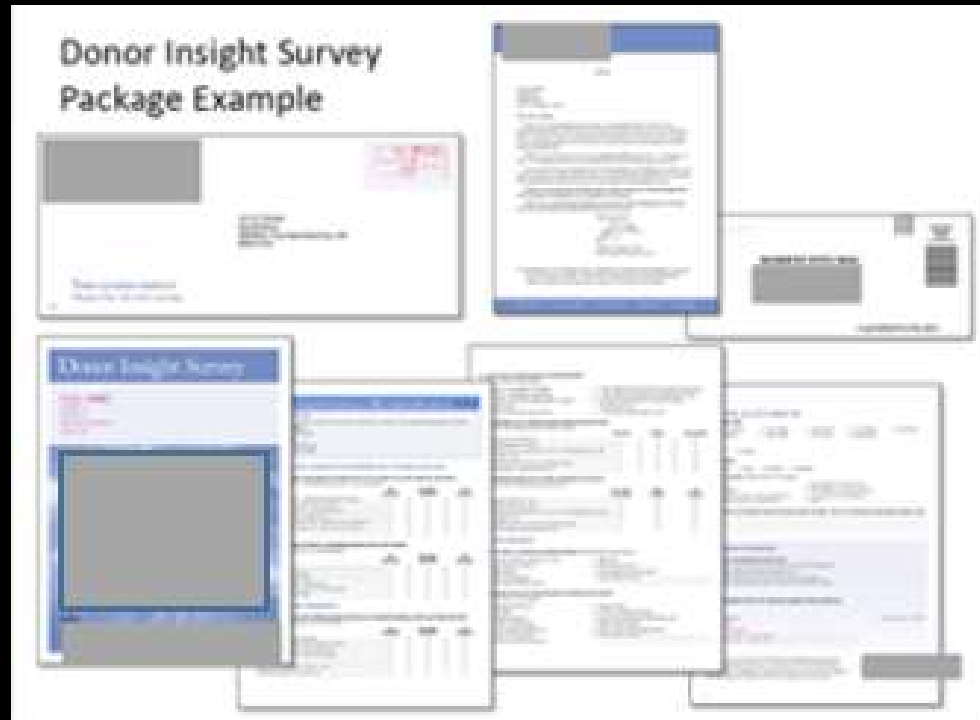
Many of our members make a gift to The Nature Conservancy through their wills or estate plans. Gifts like these can make a world of difference.

More than 20 percent of the funds we raise come from these vital gifts.

Right Evelyn Ridge Park looking towards Manhattan



Inserts



Survey



Examples include:

- Crescendo
- Market Smart
- Pentera
- Sharpe / Newkirk
- Stelter

White Label Vendors

What You Hear & Observe is Very Important!



Listening for Cues & Watching for Clues

Listen for the donor's . . .

- Why
- Desires / Goals
- Challenges
- Concerns



Listening for Cues & Watching for Clues

GIFTS VIA WILL, TRUST, &/OR BENEFICIARY DESIGNATION

Desire to “*do more*” for your organization but feel they can’t

*“I wish I could
do more . . .”*



CUES – What To Listen For

GIFTS VIA WILL, TRUST, &/OR BENEFICIARY DESIGNATION

- No Children or Widow/Widower
- Demonstrated Long-Term Giving



CLUES – What To Watch for

GIFTS VIA WILL, TRUST, &/OR BENEFICIARY DESIGNATION



ASK

“[Donor name] you’ve been a committed and generous donor to [your charity] for so many years . . . THANK YOU!

You know so many of our long-supporting donors like you have told us that they’ve included a gift to [your charity] using their will, trust or beneficiary designations. Is this something you’ve ever considered?

Conversation Starter

GIFTS VIA WILL, TRUST, &/OR BENEFICIARY DESIGNATION

- Find out where donor's at re: planning – “estate” & charitable
 - Encourage planning & explore ways(s) to include charity
 - Remind donors to keep their plans up-to-date, offer review
- You may uncover a gift they've already planned that you didn't know about
 - Thank donor, welcome into legacy society

During the Conversation

KEY LIFE EVENTS

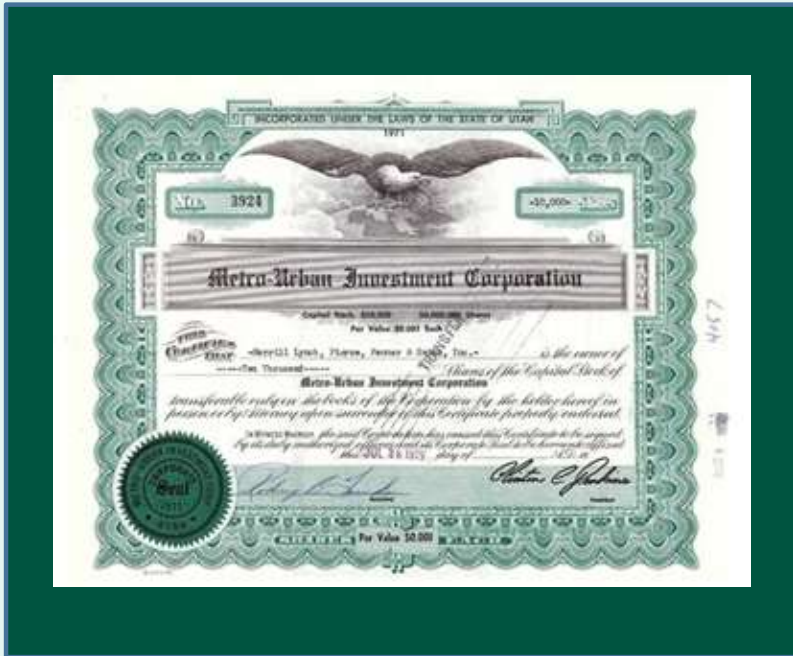
What to listen for . . .

- Change in marital status
- Change in family structure
- Sold/purchased major assets
- Illness or death in family
- Updating plans



Keeping Plans Up to Date is Crucial

NON-CASH ASSETS



- **Stock holdings**
- **Retirement assets** (Age 70.5+)
(IRA Charitable Rollover)
- **Commodities** (farmers)
- **Life insurance** (no longer needed)
- **Real estate ownership**
- **Business ownership**

CUES – What To Listen For

NON-CASH ASSETS



ASK

“Would you like to make a cash gift or would it be better to give a non-cash asset?”

Do you own stock that is worth more than what you paid for it?”

Conversation Starter

NON-CASH ASSETS

“Wow, I’m really going to get hit with capital gains tax this year on my stock investments

(Stock gift)

“We don’t use our vacation home as much anymore and the upkeep is becoming a burden. . .

(Real estate)

“We’re thinking about selling our business . . .

(Reduce taxes by funding a Donor Advised Fund (DAF) or a Charitable Trust)

CUES – What To Listen For

LIFE INCOME GIFTS

What to listen for:

- Concern over capital gains on stock or real estate sale.
- Concern over low interest rates
- Desire to do more but limited by income
- Approaching / considering / concerned about retirement
- Concerned about providing for a loved one

Cues

LIFE INCOME GIFTS



ASK

- Charitable Gift Annuity
- Charitable Trust

Did you know you can make a gift to [Charity] that:

- *Provides you payments for life*
- *Gives you a current income tax deduction, and*
- *Enables you to make a meaningful future gift to [Charity]*

Conversation Starter

YOU DON'T NEED TO KNOW EVERYTHING

“I am not an expert in this, but . . .

. . . with your permission I would like to introduce you to [someone], who can talk with you about it. They can give you more details and help you to:*

- *Explore what giving options would be best, given your unique situation & goals.*
- *Determine whether that would be a good asset to use for funding your gift.*

** Colleague at work, a Leave 10 partner, a community foundation partner*

Partner with Experts When Needed

COLLATERAL – KEY TO SUCCESS

- Sample language for gifts via will & living trust
- Charity's official name & EIN # for beneficiary designations, etc.
- Stock transfer instructions
- Gift intention form
- Legacy society collateral
- Estate administration collateral

Minimum Collateral

BACK ENGINE – KEY TO SUCCESS

- Tracking leads
- Tracking known future gifts (Estate Expectancies)
- Documentation of future gifts
- Processing gifts of non-cash assets
- Stewardship / legacy society
- Estate Administration – upon donor death

Future Webinars Will Address



Integration is Key



Planting seeds . . .



Consistent “watering”



- Do NOT “Count it & forget it”
- Gifts are revocable
- Plans destabilize
- Don’t ignore oldest donors
- Keep loving on your donors

Planned **Bequest** = Beginning, NOT the end



Stewardship



- **WHY ?** Solution
- **WHAT ?** Messaging
- **HOW ?** Design
- **WHO ?** Target audiences
- **WHERE ?** Leveraged & Dedicated
- ... **STEWARDSHIP** Love your donors till death

Keep in Mind . . .



You **CAN** do this!

- **Gift Types** “Everyone” Can Do
- **Target Audience(s)** Deepest Engagement, Age Childless, Widow/Widower
- **Strategies** Start with “Leveraged” Efforts
- **Collateral Suite** Minimal needs
- **Legacy Society** Start

Just Starting Out / Relatively New



You **CAN** do this!

- **Gift Types** Add More Complex Options
- **Target Audience(s)** Expand Segments
- **Strategies** Add “Dedicated” Efforts
- **Collateral Suite** Expand
- **Legacy Society** Expand

Intermediate / Advanced



You **CAN** do this!

- Listen for donor's heart, challenges, goals, etc.
- Listen for cues
- Watch for clues
- Be relational, not transactional
- You don't have to be an expert – you have partners

Keep in Mind . . .

Q & A

Questions

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SPECIAL THANKS

to:

Leave 10 South Sound Sustaining Partners:

- Greater Tacoma Community Foundation
- The Ben B. Cheney Foundation
- Community Foundation of South Puget Sound
- MultiCare Foundations
- Cornerstone Financial

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