

The Top Tips from your Planned Giving Panel

Tamara's Help with Identifying a Prospect

What does a planned giving prospect look like?

Top three hints:

- 1) Everyone is a prospect
- 2) Everyone is a prospect
- 3) Everyone is a prospect

No joke!

- 1) Everyone is a prospect
- 2) Don't ignore the squeaky wheel. If they self identify, follow up!
- 3) Despite what they say, money isn't everything loyalty is.

Curt's Top Three Thoughts on Integrating Planned Giving Into Your Daily Routine

- 1) Best Reference and Ongoing Information Resource: The Chronicle of Philanthropy
- 2) Potential Donors (Prospects)
 - a. Engaged with your organization
 - b. Level of attachment
 - c. Interested in making a difference
 - d. Capacity to give
- 3) Organization Basics (Prospectors)
 - a. Institutional stability, credibility
 - b. Demonstrated success over time
 - c. Donor base
 - d. Professional assistance, advisors available
- 4) Framework for giving (Professional assistants)
 - a. Board buy-in
 - b. Philosophically donor's wishes come first
 - c. Estate planning

Rebecca's Top Hints for Planned Gift Marketing

- 1) The wealthy are not the only prospects for planned gifts.
- 2) The best indicator of planned gift potential is loyalty and involvement with the mission.
- 3) Planned gifts are life-event related. Repetition is crucial to success.

Morgan's Tips for Your Legacy Society

- 1) Inclusive, NOT Exclusive - Your Key to Discovery
- 2) Creating your "Thank You" Highway - Good stewardship involves frequent reminders of your special relationship and builds donors' connection to mission.
- 3) Changing your conversation - Legacy Society gives you opportunity to explore new directions with your donors.

Bob's Top Three things to move planned giving forward:

- 1) Create a plan and work the plan (If you can only market bequests than market bequests)
- 2) If you have policies use them, if you don't, take the time to draft them as you will need them.
- 3) Use the resources available to you to scale a program that fits your budget and your organization