

Relatively Simple Things You Can Do in the Next Year to Jumpstart Your Planned Giving Program

- **Add charitable bequest instructions and suggested wording on your website.**
Remember that 80% of bequests come as surprises to the charities. Make it easy for shy donors and their attorneys to add your organization to wills and trusts. Having the accurate information on line also minimizes the chance for confusion: it's important for the donor to name your organization correctly!

- **Add "I would like information for including your organization in my estate plans" language on your gift envelopes and on-line giving page – and be prepared to respond!** *Give potential planned giving donors a chance to self-identify!*

- **Create a Legacy Society – or, if you have one, commit to doubling its membership.**
Establish yourself as a planned giving destination – and make it a club that people will want to join.

- **Highlight a planned giving donor in your next newsletter and on your website.**
*Give examples of folks who've done left a legacy or who are planning to! Nothing so inspires like real-life community members who've made that commitment – especially if they're well-known, well-liked, and **not** extraordinarily wealthy. "If Nancy and Jim could do it, well, by golly, so could I!!"*

- **Schedule planned giving training for your board.** *It's important for your board to understand planned giving – and to lead by example by becoming planned giving donors themselves!*

- **Clarify in your Gift Acceptance Policies the terms for creating a named fund.** *Make sure you don't accept permanent endowment funds that are difficult to administer or have little mission impact. Clarify how you will handle non-cash gifts. And set a high-enough minimum for named funds to encourage larger gifts.*

- **Know how to answer a donor who asks, “I’d like to set up a Charitable Gift Annuity with you. How can I do that?”** *Will you accept CGAs? If so, will you manage them in-house? Or with a community foundation, national affiliate, or a bank? Be ready!*
- **In your materials, make mention of the two particularly easy ways to donate retirement assets.** *Remind your readers that they can designate your organization as a beneficiary of IRAs and 401(k)s. And, especially at year-end and tax season, remind them of the IRA Charitable Rollover. Both of these kinds of gifts can be done without paying lawyers!*
- **Make a list of all your donors who have made stock gifts – and commit to building your relationship with them.** *These donors are already accustomed to donating from their assets. Stock donors are sophisticated – and have capacity. They are prime planned giving donors!*
- **Make a list of your most loyal donors.** *Your biggest donors may not be your best planned giving prospects. Studies show that your best prospects for a bequest are donors who have given you small amounts every year for a very long time. Get to know them!*
- **Have a brokerage account.** *Be sure you can handle an outright stock gift competently and expeditiously. Have the information readily available, in writing, to share with donors and their financial advisors. Not only is this important in its own right, but it shows that you’re an organization that can be trusted with a legacy gift.*
- **Provide contact information whenever and wherever you mention planned giving – on your website, on paper... everywhere!** *Make it easy for donors (and/or their attorneys) to do business with you. Give a name, email, and direct line for the donor or advisor to call about a planned gift.*

