



# Introduction

Nonprofit leaders today are faced with doing more with less. Too few have long-term fundraising plans in place because of the urgency to meet immediate and short-term financial obligations.

Charitable gifts that are planned by donors can help ensure the sustainability of an organization with guaranteed revenue streams, and provide peace of mind for all concerned. They are in addition to annual gifts, memberships, grants, events and other sources of support.

This Planned Giving outline is offered to help you think about it, now, soon, or anytime. Any nonprofit, regardless of size or age, can follow these practical, easy steps to effectively, efficiently and confidently start or expand a planned giving program.



# Planned Giving: Why and Why Not?

- Planned gifts are essential
  - Sustain organizations with future revenue streams
  - Enable donors to make meaningful gifts
  - Create legacies for both donors and the organization
- Common excuses for *not* using Planned Giving
  - It's not worth my time
  - We don't know rich people
  - It's too complicated
  - It's too expensive
  - I don't know how to talk about death

# What is Planned Giving, Anyway?

## Mostly..it's bequests..at first.

### PLANNED GIVING BASICS

#### What is it?

Gifts of assets that require more planning

Gifts of assets that generate income for donors

Gifts created in perpetuity

#### Why is it important?

Gives your donors a unique way of supporting your organization

Provides potential tax income benefits for your donors

Takes advantage of current market trends

# What's Your Excuse?

*“We don't know rich people...”*

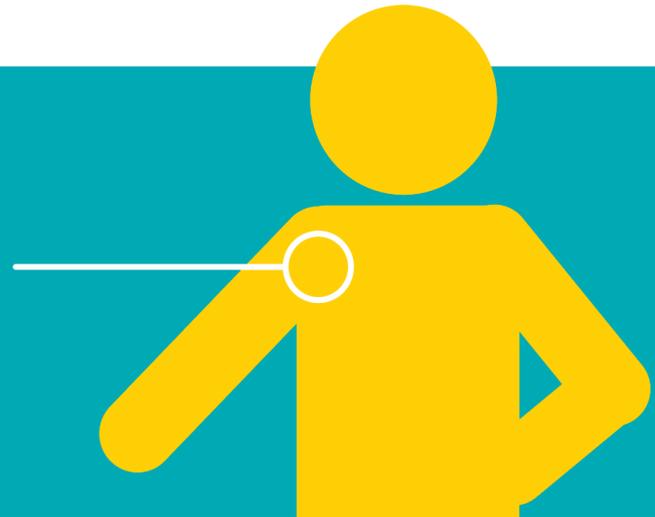
You don't need to. Planned gifts are appropriate for donors of all means.



# What's Your Excuse?

“*It's too complicated...*”

The solution is to partner with experts and pro bono professionals who can set up and administer planned gifts for your organization.

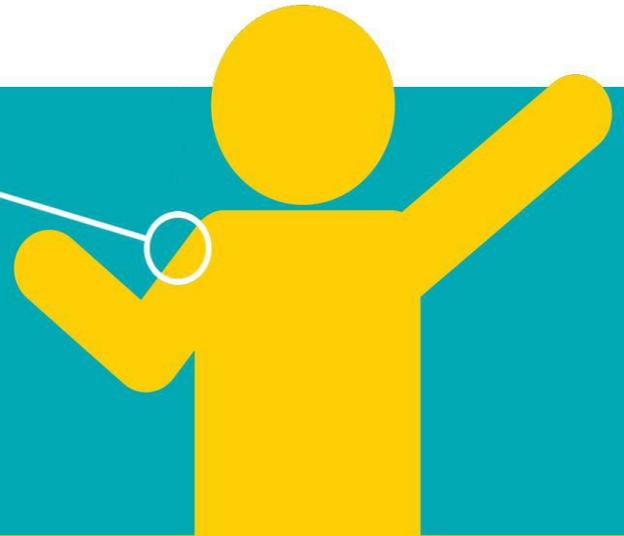


# Think about a Legacy Society

## Even if no one is in it yet...

*“It’s too expensive...”*

Starting a legacy society costs absolutely nothing. Say you have one and you’re more than half way there.



# Legacy Society

A Legacy Society is simply a group of individuals who express their values by pledging a charitable gift to a nonprofit in the future.

- Costs *nothing* for nonprofit to establish and requires *no* legal paperwork
- Deepens relationships with current donors
- Honors future donors
- Focuses on giving that begins now and leaves a lasting legacy
- Four easy steps any nonprofit can take:



## 1. Create

Creating a legacy society is as easy as saying you have one. You can give it a specific name or not. No legal documents need be established.



## 2. Honor

Determine what benefits you can offer legacy society members now; where you can post names, host an annual luncheon, etc.



## 3. Recruit

Make donors who have already pledged a planned gift founding members; use the templates to reach out to donors with whom you have existing relationships.



## 4. Integrate

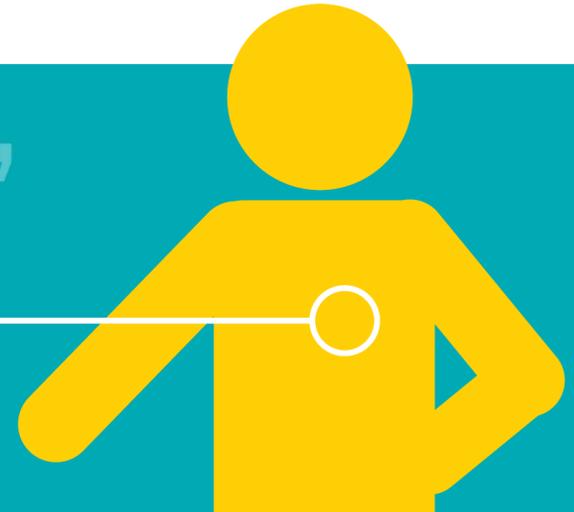
Integrate information about the new legacy society into all your materials using the templates. Share information with members about planned giving options that they may not even know exist.

# Don't want to talk about Death?

## Change the focus

*“I don't know how to talk about death...”*

Sustainability, cultural heritage conservation, and personal legacies are all positive ways to frame the conversation.



# Don't Want to Talk About Death? Don't.

Focus on the present while talking about the future. For example:

## 1. Sustainability

“The needs of this community (hunger, homelessness, etc.) are ongoing. A legacy gift ensures that our organization will be around years from now to fulfill those needs.”

## 2. Next Generation

“Legacy gifts ensure the well-being of future generations and serve as an inspiration to others to do the same.”

## 3. Heritage

“You understand the importance of preserving our rich heritage and cultural identity. Legacy gifts provide donors a meaningful way to ensure this lasts decades into the future.”

## 4. Personal Legacy

“Becoming a member of our Legacy Society ensures that the issues you care about and the values you cherish will be long remembered.”

What's Your Objective?

**Building and Strengthening  
your current**

**Individual  
FUNDRAISING**

What's Your Message?

**Live a Legacy.  
Leave a Legacy.**

## Get started!

- Engage your Board of Directors—tell a story about a planned gift, even a “planned” planned gift.
- Deepen relationships with current donors and make the “ask” easy
- Gain the confidence and language you need to start conversations with donors, and then follow through
- Consider a Legacy Society—really.
- Place information about planned giving on your websites, annual reports, event programs, etc.