

18 Ways to Market Planned Gifts

Not sure how to get the word out about your planned gifts program? Here are 18 proven ways to market planned gifts in your community.

1. Direct mail

A steady direct mail program that promotes your planned gifts opportunities is a winner. Regularity is more important than making a big splash. People are not always ready to listen. The more you mail, the more likely you are to catch someone in a listening mode.

2. Informative articles in the organization's publications

Put stories and examples of planned gifts in your organization's various publications and on its website.

3. Tours

Chance are, if you get someone to come for a tour of your non-profit, you have moved them significantly closer to making a gift.

4. Legacy society

This recognition society will help promote planned gifts in a very positive way through peer-to-peer influence.

5. Meet with agents of influence

These are people who influence people's money and other assets—trust officers, attorneys, financial planners, CPAs. Let them know your organization desires and promotes planned gifts.

6. Advertise

Get creative—put ads in the community newspaper advertising gift annuities. It may work in your locale.

7. Bequest Awareness Program

This is an ongoing marketing program to promote testamentary gifts, or gifts by will—where 80 percent of all planned gifts originate.

8. Brochures

You can buy stock brochures from several companies or even produce your own. Keep a ready supply of brochures that promote different gift arrangements. Imprint them with your logo.

9. E-marketing

There are services that will help you develop a web presence for planned gifts. This involves some financial investment, but many organizations are reaping the benefits of such arrangements.

10. Letters

People get very few personal letters these days. If you customize your cultivation with letters and hand-written notes, you will help draw your prospect closer to making a gift commitment.

11. Newsletters

There are stock newsletters you can buy from vendors. You can write your own. The key is to highlight planned gifts by telling stories and using examples of *who* makes such gifts, *how* to make a gift and what the gift can *do*.

12. Phone calls

Planned gifts are relationship based. Phone calls are easy ways to stay in touch with people, provide updates, ask questions, issue invitations, and keep up to date.

13. Personal meetings

There is an art to the planned gift "courtship." Much of it involves meetings with prospects in their homes and offices—their "personal space." These meetings are designed to bring the prospect closer to making a gift. They are the stock and trade of planned gift professionals.

14. Press releases

When your organization realizes significant planned gifts, it's effective to publicize them through press releases. This gives prominence to your organization and the donor(s), but it does something even more valuable: it positions you as a leader in that kind of giving. Success breeds success and people like to give to organizations that do things right.

15. Referrals

There is a definite sales aspect to planned gift fundraising. The most valuable sales tip you can get is a quality referral. When someone does this, they are putting their reputation on the line. Use referrals with a high degree of respect and they will pay off.

16. Response packets

When you send a mailing or give a tour, be prepared to respond to inquiries with tailored response packets. These may include information about your organization, about how to make a planned gift, brochures, articles, and your business card. Give careful thought to what goes in these packets and use just the right amount of material. Many over pack these packets and the sheer bulk of material assures no one will read them.

17. Seminars

You can offer seminars on topics like estate planning and setting up trusts. Use outside expertise whenever possible. This positions you as providing a valuable service (free, of course) and creates an easy opportunity to meet prospects and begin or strengthen a relationship.

18. Testimonials

A testimonial is a reference, one that says the donor had a good experience in making a planned gift. Testimonials take the form of letters, quotations, and stories. Try to gather testimonials from a variety of sources in order to broaden your appeal when you use them.

With planned gifts, marketing is most effective when it is regular. You may use a big splash to publicize an Endowment Campaign, but gifts usually come through steady information and careful cultivation of relationships.

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