

Planned Gifts: Where the Money Is

Why do planned gifts? There are many good reasons, but the most important is this: there is huge financial potential for your non-profit organization. Here are five facts to encourage you to start or step up your gift planning.

1. Fact: Most planned gifts come through bequests, the simplest of all planned gifts.

Year in and year out, about 80 percent of planned gifts come through an estate gift—a will. This is also the simplest gift to arrange in most cases.

2. Fact: The second most frequent planned gift is a gift annuity, which is simple to do.

About ten percent of planned gifts come through gift annuities. These involve a one or two page contract and rates suggested by the American Council on Gift Annuities.

3. Fact: People don't make planned gifts because they are not asked to do so.

This is the same as it is with other fundraising. The main reason people don't give is they are not appropriately asked. If planned gifts are not solicited, they don't happen very often.

4. Fact: The largest gifts your organization ever receives may come through planned gifts.

A bequest can come in any size, from \$1,000 to millions.

5. Fact: Planned gifts benefit donors in many ways.

A planned gift provides a donor the opportunity to make a significant gift commitment in their lifetimes. The donor may receive tax advantages, recognition, and lifetime income. But one thing is for sure: they will receive the satisfaction of giving.

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