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## The Top 12 Steps to Top Notch Planned Giving (And What to Expect When You Try Them)

### 1. Adopt Planned Giving Policies and Procedures

What you can expect: As easy to accomplish as it is to overlook. Show donors you take their ultimate gift seriously, and protect the interests of your organization through well crafted gift acceptance, gift allocation, and investment policies.

### 2. Purchase Prepared Planned Giving Marketing Materials

What you can expect: Easy and effective, especially for basic brochures. Don't waste your time researching and writing materials that reputable vendors can provide at high quality and reasonable cost.

### 3. Provide Standard Bequest Language in Communications

What you can expect: Easily accomplished, and likely to reveal an existing bequest or two. Even your staunchest supporters may overlook you in their estate plans if you don't remind them of the opportunity to include you.

### 4. Form a Planned Giving Advisory Council

What you can expect: It depends. This group will be as functional and productive as your board, development committee, and other volunteer groups – or as dysfunctional and unproductive!

### 5. Train Staff and Volunteers

What you can expect: Resistance. To mitigate it, focus only on bequests initially and provide consistent, readily available low-cost training opportunities. As with all fundraising initiatives, staff and

volunteers must clearly understand the rationale for the program and its goals.

6. Conduct Regular Estate Planning Seminars

What you can expect: Low turnout – but don't be discouraged. Most people only care about estate planning when they think they might die. Partner with respected financial planners and attorneys for a low-cost ways to promote planned giving. Start out with a semi-annual presentation and gradually expand to quarterly.

7. Create a Planned Giving Recognition Society

What you can expect: An easy, smart thing to do. Name the society in a mission-oriented way, to recognize a founder or an important figure in the evolution of your organization. Creating the society heightens the importance of planned giving and is easy to incorporate into existing annual reports.

8. Segment Prospective Donors to Target for Planned Giving

What you can expect: More opportunities than you thought. Just as with other fundraising efforts, take an inside-out approach: yourself, the CEO, current and former board members, founders, staff, habitual major donors over age 40, and habitual annual donors over age 40.

9. Put Your Organization in Your Own Estate Plan

What you can expect: An eye-opening experience. This exercise will make clear the financial, family, and psychological issues that prospective donors will face when considering a planned gift. It is a highly useful undertaking.

10. Solicit Your Board

What you can expect: A cool reception. Board members are generally slow to warm to the idea of a planned gift, especially if board recruitment is haphazard.

## 11. Solicit Your Donor Segments

What you can expect: A long gestation period. People without an estate plan don't like to contemplate their mortality. People with estate plans do not update them frequently. Understand that the planned giving process is a marathon, not a sprint.

## 12. Present an Annual Planned Giving Recognition Event

What you can expect: Satisfied donors and increased annual gifts. A very smart use of resources. While statistically most donors do not change their planned-giving beneficiaries, continued stewardship is great insurance. More importantly, the event provides your organization with the opportunity to highlight the stories of those who have supported the program, and a significant cultivation opportunity that can lead to increased annual gifts.