


**Marketing planned gifts is
complex, expensive, time
consuming and a pain in
the gluteus maximus.**

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Your
Planned
Giving **I.Q.**

www.PGIQ.org

1

If you're not asking your prospects for planned gifts, *someone else is.*

2

Eventually that "someone else" will *steal your cash gifts, too.*

3

5% of this nation's wealth is in hard-to-get cash.
95% is in easy-to-get assets.

4

Those who even dabble in planned giving
eventually earn *50% to 100% more*
than those who don't.

5

A typical planned gift is *200 to 300 times*
the size of a donor's largest annual gift.

6

Planned gifts *do not affect prospects' cash flow.*
They're easy to give (and to receive).

7

Prospects are *eager to make a planned gift*,
but simply don't know how.

8

Prospects making gifts through their wills
typically *increase their annual support*. Why?
Because they've made you part of their family.

9


Anyone can make a planned gift.

10

It's *easy* and it *works*.


1

Where Is The Money?


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Common Sense Planned Giving:

**Focus on gifts
anyone can make.**

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Bequests
Appreciated Stuff
Life Insurance
IRAs


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**What is special about
these gifts?**

Do not affect cash flow

Easy to give and receive

Do not require a lawyer

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Don't Forget:
Real Estate.



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2


**How Do You Get
The Money?**



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**Much has changed over
the last 30 years:**

The way we market
and **The way we buy**
The patience of the prospect

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**Stop telling the
prospect we can't wait
for him to die.**

Benefits vs. Features

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Micro-Target

Number one predictor:

Loyalty.



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Donor to VP:

“Is the Foundation on
the ground floor
or basement?”



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**You can make a gift that
costs nothing during
your lifetime.**



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**Did you know you can
make a gift and receive
guaranteed income
for life?**



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Do you have your own elevator pitch?



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“ If I can show you a way to redirect your taxes to benefit your family, your community and our mission, will you give me a half an hour to discuss that with you? ”

**Jack Miller
Pittsburgh, PA**



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Solicitation letters.



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Columns and Articles



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Public Relations

Donor stories motivate others to give and generate second time gifts.



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3

Some Challenges to Overcome.



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Vanilla Marketing.

Make Them Complain.



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Shiny Objects of the Year

Social Media

E-Marketing

Latest Research and Discovery



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**US mail, not e-blasts,
is still king in getting
responses.**



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**Treating Planned Giving
as if It's Fundraising.**



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Bequest, Bestow, Bequeath?

(Don't Make Your Prospect Think)



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**The day I listen to the Zoo
about how to restructure our
portfolio, I'll send our broker
there to feed the elephants.**



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Single Shot Marketing

**If you are going to mail once
and stop, stop before you mail
the one mailing.**



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Sending Out Death Brochures.



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**Using one medium to
market to your prospects.**



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4

**What Others
Are Doing**

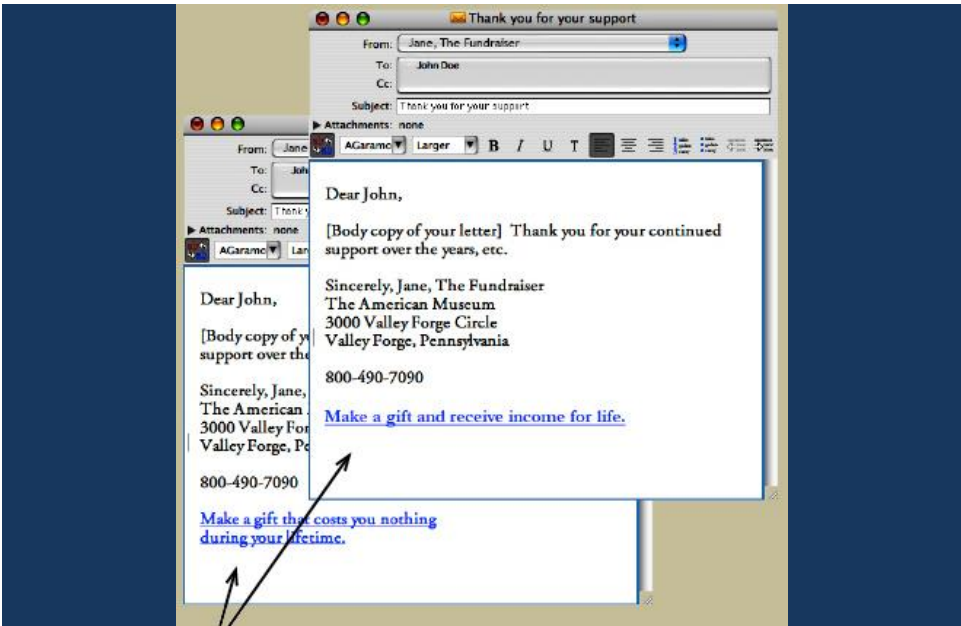


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Know Your Prospect. (serious)



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JUST GIFTED



GOT REAL ESTATE?

- ✓ If you own a home or vacation home that other family members don't want...
- ✓ If you own property that is burden to manage...
- ✓ If you own property you don't need any more...
- ✓ If you are likely to owe significant taxes if you sell a property...

You can do the same good deed as the Johnstons, and Westin can help. Donating real estate brings you peace of mind as well as the satisfaction of creating a lasting legacy that supports a mission you believe in, while taking advantage of potential financial and other benefits for yourself or someone you love.

Please contact me personally to learn more about Retained Life Estates and other appealing ways to make a gift of real estate to Westin Memorial.

MIKE MILLER, 123-456-7890 | MIKE@WESTINMEMORIAL.COM



Westin Memorial Health System

The Johnstons helped Westin Memorial and benefitted themselves, too. Because they made their gift through a Retained Life Estate, they can continue living in their house for as long as they wish! They also receive a charitable tax deduction, avoid potential capital gains tax, and can exclude the property from their taxable estate.



**Bring
Something
Special
to the World**

Make a gift that costs nothing during your lifetime.

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**“I’m too young
to make a gift.
I’m saving for
retirement.”***

* We have a gift plan that helps you do both. It’s called a Deferred Gift Annuity!

everybody’s talking

*Donating stock to our shelter
can be more beneficial
than giving cash!*




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It's okay to be selfish when you give.

Did you know you can make a gift and receive guaranteed income for life?
It's called a Charitable Gift Annuity.

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“I DON'T HAVE TIME TO WRITE A WILL.”

Famous last words.

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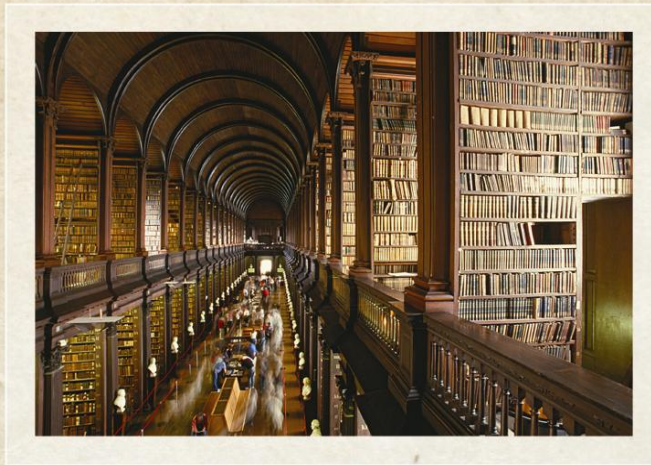
**Don't worry.
You don't need a will.
The government will
take care of it for you.
*Really.***



**COUNTRY DAY SCHOOL
FOR BOYS**



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**WITH A VERY SIMPLE GIFT, YOU CAN HELP
US WHAT WE DO TODAY, EVEN BETTER TOMORROW.**

What Future?

I won't go to college.
I won't have a career.
I won't have a family

Because I won't be
living that long.



"I want the
children to
remember me."

It's easy.

You can make a simple, yet
transformational gift through
your will or estate that **costs**
you nothing during lifetime.

Copyright © 2013, PlansetLiving.com

Leave your mark.

Share life with others by
leaving your legacy.



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*The good news is we have enough money
to build our new building.*

The bad news is it's still in your pockets.

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GUESS WHAT, DAD!
-SPIKE AND I ARE
GETTING MARRIED!



**Having a
Bad “Heir”
Day?**

**Reason #27
for updating
your will.**

5
The End is Near


**“We’re waiting to develop
a formal program in order
to proceed.”**

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**Treat your donors as friends
and your prospects
as donors.**

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**No one Googles Unitrusts
First Thing in the Morning.**

**Use common sense
marketing... it's all about
relationship and sales.**

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