



**BEQUEST MARKETING EVERYONE  
SHOULD DO**

**PG CALC WEBINAR**

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## **Introduction**

*“We make a living by what we get,  
but we make a life by what we give.” — Winston Churchill*

The main reason people don't leave a bequest to their favorite charity is they aren't asked. That sounds shocking, but for many charities this is true. These organizations either don't have a planned giving program as a part of an overall fundraising effort, or they simply don't market bequests on a regular basis.

Organizations large and small have the potential to raise large sums of money through planned giving, and donors receive the satisfaction of both creating a legacy and giving more than they might have dreamt they could. Whether you are beginning a new program or hoping to invigorate an existing one, planned giving marketing that focuses on bequests should be a part of your communication strategy with your best donors. Just a few words can make a big difference.

“Will you consider making a gift to our organization in your will?”

Is it really that simple? Yes, it can be deceptively simple, but that doesn't mean bequests, let alone funds, will come right away. It can take time, consistent effort, and proper messaging. The cultivation process of proactively marketing, educating, and soliciting bequests is different for each charity. Yet, equipped with the right formula, every organization can have an effective bequest marketing program that provides future funds for its mission.

This discussion will focus on the planning, messaging, and tactics of a successful bequest marketing program.

## **II. Create a Plan**

*“In preparing for battle I have always found that plans are useless,  
but planning is indispensable.” — Dwight D. Eisenhower*

According to the Giving USA 2020 annual report, Americans gave a record \$449.64 billion in 2019. Bequest receipts were 10% of all giving representing \$43.21 billion. This reminds me of the famous criminal Willie Sutton who was once asked why he robbed banks, and his response was, "Because that's where the money is." Whether Sutton actually said this is not really known, but as a marketer it sure is good copy. If bequests account for 80 percent of all planned giving, or approximately \$34.56 billion dollars of revenue, it's not a question of if you should be doing bequest marketing, but rather, what is your plan?

Whether you have a new program or relaunching an existing one, you'll want to start thinking about a long-term marketing strategy that will promote and stimulate interest in bequest giving. Your marketing plan is your guide to successfully promoting and growing the program. Executing it will help ensure that you're using your resources most effectively and will align your activities and goals, providing you the best chance for success.

A marketing plan that works for one organization will not work for all. Your plan must be tailored to your charity and its mission. Here are the basic component parts:

1. Establish and Articulate Objectives
2. Define the Strategy
3. Execute the Tactics
4. Report, Analyze, and Revise

These four areas are sequential and must be addressed in the order listed. A strategy cannot be formulated before objectives are established, tactics can only be determined once a strategy is in place, and reporting and analysis can only take place once the program has been executed.

Objectives are the goals you set for your program. They identify what you want to accomplish, and in this case, the goal is to acquire more bequests and beneficiary designation intentions. Establishing and publicizing your marketing objectives is important to your success for several reasons. It will allow you to proceed with the confidence knowing your efforts are aligned with your organizational plans. It also allows you to share your strategic marketing vision with senior management with the hope that doing so will ensure your program is allocated the resources needed to get the job done.

Your messaging must also be tailored to your goals. Make sure your marketing message and collateral are consistent and that your marketing tactics are focused to achieve your goals.

Common tactics include:

1. Newsletters
2. Brochures, mailers and postcards
3. Email newsletters and messages
4. Planned giving ads and articles in publications
5. Social Media

A more detailed explanation of marketing tactics is discussed later.

An effective marketing plan will give you clear goals, strategies, and tactics to reach those targets. You'll also need to choose the appropriate metrics to help you track your progress, so you can revise your efforts for continuous improvement.

Other things to consider:

- Budget. How much can you afford to spend each fiscal year? Does the time savings of using a vendor outweigh the overall cost to your budget? Is print-on-demand a better option than the cost of pre-printed collateral and marketing material? Is digital marketing effective enough to allow less direct mail if the justification is cost savings?
- Your target donors. Use predictive modeling to analyze the distinct characteristics of your donors. If you have not used a data-analysis package or a scoring service now is the time. Indicators such as donor loyalty can be huge factors in identifying your top planned giving prospects.

- Marketing schedule. Create and follow a marketing schedule. Schedule all planned giving mailings with all other internal communications in mind. Overlapping mailings can be a waste of money and over-mailing of email can cause spam complaints and unsubscribes.

Lastly, marketing must be consistent. One mailing every five years is not a plan. You need constant cultivation with your marketing mix. Sometimes your best donors might see your direct mail several times before reaching out to you. They save it and discuss it later with a spouse or advisor. And when the time is right, they call you.

Creating a marketing plan by itself will not make you a better marketer or bring in more gifts. It is your execution of the marketing plan that will. Following your plan will result in more organized and efficient marketing. If you are a small program with little staff and little time to waste, the more prepared and methodical you can be the better.

Don't just engage in random acts of marketing. Work strategically. Follow your plan or set one up for the first time. It can be done at no cost in-house, or you can outsource and find a vendor to help you create one.

### III. Find Your Audience

*“There are always two people in every picture:  
the photographer and the viewer.” — Ansel Adams*

What comes to mind when you think of the ideal bequest candidate?

Are they older wealthy donors that are primarily motivated by tax incentives? Or is it younger donors that are creating an estate plan for the first time? What if both were true?

The truth is that legacy decisions are most frequently influenced by events in a donor's life, such as the birth of a child or grandchild, the sale of a business, retirement or the death of a spouse, etc. This happens to the young, the old, the wealthy and the super-wealthy. However, the difficulty of using this as a sole marketing factor is that life events are not easily known by the fundraiser, and not all donors have a life changing experience at the same time. Thus, it is virtually impossible to predict who in the database will experience a cash infusion, or loss that requires reallocation of assets. Or who has finally decided it is time to create their legacy.

Instead we need to segment based on what we know. This involves breaking your entire pool of prospects into smaller groups, based on demographic or giving similarities, in order to utilize targeted messaging. The traditional statistical models look at your donors' ages, lifestyles, and giving histories in order to identify your best planned giving prospects. For example:

- Those who already have a planned gift
- Consistent annual fund donors (i.e., 10+ years, 8-10 years, 5+ years, etc.)
- No Children, and/or no heirs
- Over 65

- Engaged board members and volunteers
- Those closest to your organization

You can also characterize it as FLAG, (Frequency of giving, Longevity of giving to the organization, Age, Giving history.) The frequency of giving is seen as the single most important gift indicator. It is also important to group and rate your donors based on their age and the number of gifts they have given over specific periods, for example, seven gifts in the past 10 years. Patterns of loyalty can vary from charity to charity, but you know a donor who has you “on their list” when you see one.

We always suggest you start with those who already have a current planned gift commitment in place. Don’t ever stop marketing to this group. Revocable gifts can be changed at any time. Use your recognition societies to keep these donors informed about your program. This includes thanking them for their commitments and establishing a personal relationship if one does not exist already. There is no reason why you shouldn’t attempt to convert revocable bequest, into an irrevocable commitment as your relationships evolve. Or show them the opportunities offered by life income gifts in addition to a bequest.

Also, don’t overlook donors who, although loyal through the years, fall below certain annual giving amounts. Some donors will never make high dollar gifts during their lifetime because they are conservative or need security that assets will be available for future unforeseen circumstances. These donors may be willing to make a significant gift at death.

Whether you decide to segment a mailing at 65, 55, or 45 years of age is a judgement that must be made by the individual organization based on your tangible and intangible knowledge of working with your donors, the goal you are trying to achieve, and as always, your budget.

### **Donor Surveys**

Another way to find your audience is through a donor survey. Survey results provide a snapshot of the attitudes and behaviors – including thoughts, opinions, and comments – about your donors. They are also called an untapped resource for planned gifts since they allow donors to self-identify as prospects and otherwise unrecognized legacy society members. Most importantly, surveys can be leveraged to generate qualified bequest leads who just may be ready to take the next steps.

Survey questions are written to allow your respondents to raise their hands and tell you they are ready to make a legacy gift. Not only that, but the mere fact that they have taken the time to offer valuable feedback, regardless of how they answer, means they should be flagged as highly engaged prospects. And this fact alone is enough to justify reaching out to them immediately for a discussion on making a bequest or other legacy gift.

For some smaller organizations this is certainly the case, but for larger entities that have multiple leads already in the pipeline, urgency to reach out to these new leads may not be present. To these programs this may be a lead, but not fully qualified yet (but they can still get a “thank-you.” But that is the point of surveys... to help identify and qualify leads.

## **IV. Messaging**

*"One day I will find the right words,  
and they will be simple." — Jack Kerouac*

At the start of any bequest giving program branding is essential. Brand your program as an opportunity for donors to gain the satisfaction of creating a legacy and leaving a lasting impact with their gift. Your initial promotions should try to include testimonials of current donors. Let their words sell the viability of the program. New donors look to see themselves in these current members. Showcase their judgment and knowledge. Nothing is stronger for your marketing.

Your message should also be more about the huge impact a gift will have on your mission rather than the technical aspects of any gift. Keep the messaging simple. Tax benefits can be important to many donors, but the bottom line is that a planned gift can create a life-changing impact like no other. Even the use of the terms “planned giving” or “bequest” can be troublesome to some donors. It can seem confusing and/or overwhelming. Yet once they learn the basics, your donors will begin to comprehend that a planned gift can be made simply and be very rewarding.

For more on the use of language in bequest giving you should read the research of Dr. Russell James of Texas Tech University. Dr. James is the leading academic studying planned giving, and he has done extensive research on the best phrases and words to use when promoting planned giving.

Dr. James found that formal and technical terms reduce the chances that a donor will be interested in making a planned gift. For example, saying “a gift from your will” may be more impactful than using the term “bequest.” Also, for example, “receive a tax deduction and make a gift that pays you income for life” is more attractive to donors than just using the term “charitable gift annuity.” And so on...

You can see the logic here, but there are no absolutes. Your best donors may react differently. When in doubt, test it. Your group of donors may be pre-conditioned to see the term bequest and respond well to it. However, wouldn't it be fantastic if you changed your messaging to use the phrase “gifts by will” and you doubled response? On the other hand, what if the change resulted in a decrease by half. Yikes! This is why we should test everything, and often. The language we use is important, and it can drive interest to you or away from you. There is no one right way to communicate, or any perfect phrasing about bequest giving. Your messaging strategy and direction should always be dictated by the group of donors and the response to your presented messaging.

### **The impact of COVID-19**

Successful bequest messaging focuses on the benefits to the donor, the self-satisfaction of giving, and the impact the gift will have to the mission of the organization. This continues to be true, but in the age of COVID-19, messaging is a bit more complicated. We now live in a world with panic-inducing news each and every day. There are constant reports of virus flare

ups for the spreading pandemic that include daily death tolls, overwhelmed hospitals, and additional lock downs. 2020 has been a year we will not soon forget.

But we must keep marketing.

The worst thing your organization can do in a crisis is to go silent. Keep marketing, or maybe a better way to say it is keep communicating. Using Skype, Zoom, or the like, to meet with individuals or groups of donors stating your plans and answering questions. Suggesting ways donors can help your organization in the coming months of the pandemic is a great way to keep them informed and engaged.

The donor communications you send at this time can certainly strengthen your case for future support, and your marketing message should still avoid describing the technical complexity of gift vehicles and the dry professional language of giving. However, due to the pandemic and the shocking economic downturn we have to provide more for donors. We need to provide guidance, wisdom, planning, and concern for their well-being. Each correspondence should be more personal and empathic than ever before. Even if it is just a well-placed, “we are here to help,” or “we care.” Look at it as a transition to stewardship, rather than just marketing. But your mail plans, even if altered and budget constrained, should still continue.

The fear now is being tone deaf.

Our donors are concerned about their physical and financial health and it is up to us to continue to educate while understanding the worry. Messaging must stay positive and not imply anything to do with death. Of course, you never would emphasize anyone’s passing, but donors are more sensitive than ever. Just mentioning the term “legacy” was something I was afraid to do in the early days of the pandemic, and after a few months began to use it again.

More donors than usual are reaching out to advisors to finalize plans, which is good, but they don’t want to hear they should do that in our marketing directly. They want to be in control of that narrative. It’s one of the few things in their control these days. So how do you handle this in your donor correspondence?

Here are some samples...

One way is to be overly cautious in your bequest messaging. Communicate with kid gloves, to the effect of getting their “permission” before discussing their legacy. For example:

*“We recognize that with the constantly changing COVID-19 situation around the world, this is an unprecedented time for everyone — a time that, for many, is filled with uncertainty. Our hearts and thoughts go out to each and every one of you. Please know that we are here to help you when you are ready to once again support our community.”*

Leading with empathy is important. Many at home are feeling that humanity is lacking today, so we want donors to understand we know how they feel. At that point, if, and when, they are ready to talk (gaining permission) they can reach out to us.

If that is too subtle, you can be more direct with your message of understanding and availability:

*“This has been an uncertain time. We’ve been busy sharing with others how to be smarter about their giving due to the volatility. It’s opened up some new opportunities that we didn’t have before. If you’re ever interested in learning more, just let me know.”*

Rather than directly telling them to create their legacy, this messaging is focusing on being smarter, and how you, and your organization, are here for them.

Or again, use a message of understanding and availability, but a bit stronger:

*“We know the priority right now is the health and well-being of your family, friends and community. As we adjust to the ways that the coronavirus has touched our lives — upending the economy, the delivery of health care, and how we educate our children — we want to remind you that we are here to answer any questions, and if the time is right, help you to reexamine your financial future. The questions are endless, and we’d like to help provide some answers.”*

Or a message of understanding but focusing in on gift planning and creating one’s legacy:

*“You have important priorities for your family and loved ones, and we know that they come first. Our gift planners can discuss an estate gift as well as other tax-smart ways to adapt your charitable giving and accommodate any changing financial situation. When you are ready, we will be here to help you shape a charitable gift plan that suits your needs and allows you to support and keep us a nurturing community.”*

Lastly, an example of messaging with compassion and the rationalization that supporting our organization is as important as it ever was:

*“We recognize this is an unprecedented time. A time that, for many, is filled with uncertainty and fear. Our hearts and thoughts go out to each and every one of you. Yet in times like these, we believe it is still important to provide you with helpful information about how you can help ensure our work continues in the future.”*

### **Donor Stories**

Every marketing piece should have the objective to encourage donors to take the next step — whether it’s to ask for more information, discuss how to make the gift, or notify you that a bequest has been made. This is a standard best practice and should not change due to the pandemic. Donors must be aware of the benefits of making a bequest, but also the importance of the gift. Each gift, big or small, has an impact that will advance your mission.

The decision to leave a bequest may be the perfect solution for the donor’s current situation. However, there still may be some apprehension. This is where a good donor story or testimonial can come to the rescue. Stories — specifically stories about living bequest donors — help the potential donors see themselves in this giving. Stories of like-minded individuals supporting the organization into the future and hearing them express the self-satisfaction of



creating a legacy via a bequest is powerful. They are more powerful than any tax benefit or information on simplicity or revocability.

Personal, compelling narratives that connect donors to your organization's mission are more likely to establish credibility than any other marketing piece. In the end, the power of stories and testimonials via a donor's own words and/or voice is the best marketing copy available.

### V. Tactics

*“Strategy without tactics is the slowest route to victory.  
Tactics without strategy is the noise before defeat. — Sun Tzu*

#### Use your existing assets

Your organization has an existing marketing infrastructure already in place. Why let that go to waste?

Use as much of the existing resources available to get the word out about your bequest program. Many marketing vehicles for planned giving already exist within your charity, so use them to your advantage. With proper cooperation, these efforts may be tweaked to promote bequest giving with little or no additional cost. You can start with something as simple as adding a tagline at the bottom of your letterhead and business card. You can include bequest language, legal name, and tax ID number and/or a URL. Even easier is to add a line to your email signature block.

Annual reports, newsletters, magazines, even Facebook posts should all be significant contributors to building awareness of your program. Access can range from a quick note, or advertisement, to the opportunity to publish personalized stories about planned giving donors. A donor story that shows your prospects examples of people “just like them” who were able to make a planned gift is very powerful, especially if read in a trusted publication from your charity.

Work with your internal communications team and get what space you can. Any messaging about bequest giving will suffice as it is critically important for donors to know this type of giving exists. Think of it as an “elevator pitch.” It should be concise and to the point, letting the reader know they can create their legacy at your organization with a relevant link.

That should be your short-term goal. Make sure your donors know bequest giving exists and it can be a big benefit to them and the future of your organization. A bequest will not only help the charity's mission but will also give the donor the satisfaction of creating a legacy.

And the best part is that most, if not all, of this internal marketing costs nothing.

#### Acknowledgement Inserts

Annual donors are traditionally the group with the highest likelihood of becoming bequest donors. We want to make certain that this group is familiar with your planned giving program,

and the sooner the better. As such, we suggest using an acknowledgement insert buck slip for all annual donors.

Just stuff the two-sided promotional piece that fits into the acknowledgement letter envelope. The message can be simple. Something like...

*“Thank you... Did you know you can continue, and even expand, your generosity without affecting your current finances?”*

The insert lets the donor know how grateful the organization is, and that if they wanted to give more, here are some ideas how, “you could make a gift that you never imagined was possible.” There is no ask. It is an educational planned giving thank you, sent at a time when the donor is open to learning how much you appreciate them. The brief message about how they can create a legacy with a bequest can be extremely beneficial when delivered at this time of recognition.

### Websites

Your website is often the first point of contact between your donors and your planned giving program. It must educate, create trust, and build credibility. Most importantly, it must be tailored to your mission. Your planned giving website should be a resource center that provides your donors with exactly the information they seek and leave them with a lasting impression about your mission.

The most effective websites today eliminate the visual clutter and navigation mazes of your online presence, allowing your donors to focus on your bequest message without being overwhelmed.

The home page will get the most traffic, as such this area must show donors what you want them to see in only a few seconds. With that first blink, make sure they see information on bequest giving. Don't let other gifts or options get in the way. Simplicity will beat the complicated. A friendly interface that lets a donor know they can create their legacy via a bequest will get donors to call you more than will a technical examination of the aspects of giving.

Your website should also be your resource center. It should be the one place where you demonstrate your planned giving know-how for donors. Education and awareness-building is the key. But you don't have to do it all on the home page. The home page should focus on bequests and have a link to other resources so as not to complicate that focus. Most importantly, always invite your donors to learn more by allowing them to schedule an in-person meeting or phone call. A donor raising her hand for more information is our conversion point, so make this information easy to find.

### Direct Mail

Constant cultivation is a key to success in fundraising, and it's no different with bequest giving. Building awareness with custom direct mail that includes your organizations mission and branding is essential. Your older donors will respond to messaging directed to them on an emotional level. Younger donors will respond similarly; however, most of your younger audience will respond because a direct mail message is different from the constant barrage of

email, spam and social media noise they receive. This makes direct mail stand out as something different.

Either way, it's the personal nature of the message that is the key. The content of the mailing must be tailored to your donors and your mission.

### Simple Mail Campaign

A personalized letter is a wonderful way to start reaching out to your donors about bequest giving.

A perfect example is a simple one-page letter discussing the impact of a bequest on your organization and the benefits to the donor. It should explain the important role bequests have played at your institution and encourage donors to learn more at your planned giving website or to call your office for more information. Include a postcard-sized reply card and a self-addressed envelope that can be mailed back. Include language on the reply card that allows the donor to state, in effect:

- I have included the [name of charity] in our will or trust.
- I am interested in including the [name of charity] in our will or trust.
- Please send me information on leaving a gift in my will or trust to [name of charity]

Two or three weeks later, follow up with either another letter, a postcard or a phone call from a donor or board member who has made a planned gift. Sending the follow-up from a person who has already made a gift sets a strong example. People see themselves in the actions of others and look to emulate those who they respect.

### Newsletters

A planned giving print newsletter should educate donors on the benefits and ease of making a bequest with a donor story as sample. The planned giving articles should be topical, informative and interesting to read. The newsletter should be customized to your brand and include design best practices. Images of donors, and infographics can help explain difficult concepts should be included. No one wants a newsletter that is too dense.

To do it right, this takes time and effort and often the best option is to use a vendor who can design it, and provide the bequest giving content. The donor story being your responsibility. If your newsletter has valuable information and is an interesting read, it can be your best source of leads. Good newsletters, unlike other direct mail, is saved and shared. It brings donors like-minded individuals direct to their homes and shows them the impact and the self-satisfaction of bequest giving.

### Postcards & Self-Mailers

Postcards are your most cost-effective form of direct mail and they work very well to build bequest giving awareness. They also must contain your brand, and imagery, and then mix in bequest messaging and mission copy. Remember to include a custom call to action. This includes a link to a relevant landing page on your website. Do not just stick a logo on a canned piece of

direct mail and do your best to stay away from stock photos. These will not produce the desired results; in fact, they may have a detrimental effect on the credibility of your program.

Be it a postcard or a self-mailer with a reply card, all direct mail should promote your program in the most positive way: educating with planned giving content, reassuring with mission, and triggering emotion via images.

### **Digital Outreach**

Digital marketing can be the quickest and most cost-effective way of conveying your bequest giving message. But that does not always mean it is the most effective. Remember, the best email campaigns only receive a 50% open rate, with even fewer reading. At best only half of the email you send has the chance of being read.

Your digital messaging must be relevant to your donors to elicit a response. Sending a weekly email just to send email or sending a syndicated pre-written message will not build awareness. That's the quickest way to the "delete and/or unsubscribe" file. Effective email needs to be customized to your donor's needs and generate engagement. If your email is well-written, personal, and a benefit to your donors then your email channel will build relationships faster and cheaper than anything else.

### **E-Newsletters**

Like a print newsletter, each e-newsletter should have a bequest theme focused around a donor story. Your e-newsletter can be a digital version of your print newsletter for maximum exposure to your targeted list, or it can be written as a separate marketing piece.

Each e-newsletter should be customized to the look and feel and include a responsive design for mobile viewing. Your goal should be to make every e-newsletter a benefit to your donors. Sending consistent emails because you think you need to send something will only lead to unsubscribes and spam complaints. Make certain that your e-newsletter is interesting, educational and entertaining. In other words, "a good read."

### **Single Issue and Follow-up Emails**

Several times per year you may want to send your donors a simple email on bequest giving or beneficiary designation. This type of campaign can be used for awareness building or updating donors on changes in the law and how it effects giving. A well-crafted email strategy allows your donors to not only begin to see planned giving as a viable option to support your mission, but also to see you as a trusted friend.

Many planned giving marketers are using an integrated approach by using email to support all direct mail campaigns. Email can reference the direct mail piece, provide additional follow-up information, and include a link to a website landing page. Sending a consistent message using two different mediums with similar imagery to touch your donors can have a dramatic effect on the success of the overall bequest giving campaign. Once again, this must be a customized effort to see success. A non-tailored canned message will fall terribly short.

### **Brochures**

A bequest brochure is an essential piece of marketing collateral that every program needs. It is the best option to equip a prospective donor with a quick understanding of your organization and provide an overview of bequest giving. It is easy to share and leaves a lasting impression.

For use as a fulfillment piece, a donor visit leave-behind, or event handout, your brochure needs to be customized to the look and feel of your institution and mission. There are a number of companies who offer generic “canned” brochures that can be purchased and imprinted with the charity’s name and logo. These brochures are cheaper to produce, but have less credibility as they do not follow your brand standards.

It is important to produce collateral that extends the good faith of your brand and is presented in context with your mission (don’t forget to include sample bequest language). If time and/or technical expertise is lacking in your program there are vendors that can create a customized piece that will convey brand, mission, and the benefits of a bequest to your donors. A planned giving officer’s time is always better spent out of the office developing relationships with donors than behind a desk creating a brochure or uploading web copy.

A quick aside: when using a brochure don’t expect your phone to ring off the hook. These brochures seldom elicit an immediate response. This is for awareness and education. The “call to action” will always be to call or email for more information. If, and when, the donor is ready to reach out, the contact information will be right at hand.

### **Planned Giving Recognition Society**

A planned giving recognition group, often referred to as a heritage or legacy society, can be a useful marketing tool to use in promoting bequest giving. It also is an effective way to steward planned giving donors.

A legacy society can strengthen the relationship your donors have to your organization, which subsequently may increase the retention of revocable gifts, and potentially increase the number and size of future gifts. It can also be used to identify donors who have included your charity in their will or estate plan. These intentions that were unknown to the organization often come to light in exchange for membership in the society.

Creating a legacy society and marketing it to your community increases awareness and shows that you are interested in learning about member’s future plans to benefit your mission. It also provides a greater opportunity to build relationships with those donors and identify ways to involve them in future activities. A legacy society ensures that planned giving donors are thanked, recognized, and stewarded. No donors will fall between the cracks if there is an active legacy society.

Each organization is free to choose which planned gifts qualify for membership in the society, but it should always start with bequest giving. Many organizations make membership all-inclusive in that any one of the various planned giving methods qualify one for membership, regardless of size and whether the commitment is revocable or contingent. Membership can be limited to deferred gifts or have other barriers, but the most marketable application allows for if

to be as inclusive as possible. And hopefully each donor's charitable gift that is recognized in the Society will inspire others in your community to follow their leadership.

### Bequest Challenges and Blended Gifts

Bequests don't have to be asked for in a vacuum. In fact, two very effective strategies to increase bequest giving involve marketing bequests in the context of current gifts. In one, a challenge match of current gifts is offered as an enticement for donors to make bequest commitments. In the other, donors are asked to consider an annual and a bequest gift together, understanding that often the combination is more powerful way for both the charity and the donor to reach their goals.

## VI. Conclusion

*“A man who stops advertising to save money  
is like a man who stops a clock to save time.” — Henry Ford*

As the largest source of planned giving revenue, bequest giving deserves your time and resources. By understanding the concerns of your donors and delivering them with beneficial information you can have legacy-giving conversations that will impact your organization for years to come.

Bequest marketing is not complicated. It can be as simple as making sample bequest language available. If your bequest information is too hard to find donors will just go elsewhere.

Be persistent and consistent in your communications, and sensitive to changes in a donor's life circumstances. The approaches that work today will be even more effective once the pandemic has passed. Just don't stop marketing. Be proactive. Remember, patience is a virtue.