

PG Calc | Your Partner In Planned Giving Success

Donor-Centric Marketing



Date: November 16, 2023
Presenter: Andrew Palmer
Director of Marketing Services
PG Calc


©2023 PG Calc Donor-Centric Marketing 1

1

PG Calc | Your Partner In Planned Giving Success

What are we talking about?

Using donors to bring in donors




©2023 PG Calc Donor-Centric Marketing 2

2

PG Calc | Your Partner In Planned Giving Success

Planned giving marketing



No!



©2023 PG Calc Donor-Centric Marketing 3

3

PG Calc | Your Partner In Planned Giving Success

Non-profit marketing

- To stand out, charities need to generate an emotional reaction from your audience
- Define your cause and promote your mission
- Educate and inform on the benefits of Planned giving.

The best way to achieve that is by using real donors as an example. [storytelling]

©2023 PG Calc Donor-Centric Marketing 4

4

PG Calc | Your Partner In Planned Giving Success

"Quote"

"Marketing is no longer about the stuff that you make, but about the stories you tell."

"There isn't a stronger connection between people than storytelling."

"I'm writing my story so that others might see fragments of themselves."

©2023 PG Calc Donor-Centric Marketing 5

5

PG Calc | Your Partner In Planned Giving Success

The power of real people

Storytelling

Testimonials

Legacy Society

©2023 PG Calc Donor-Centric Marketing 6

6

PG Calc | Your Partner In Planned Giving Success

Why do we use real people in marketing

- When we hear stories, we immediately relate them back to an existing experience...
- And how that makes us feel.
- We are narcissistic in this way—but it explains what makes storytelling so effective for marketing purposes.

©2023 PG Calc Donor-Centric Marketing 7

7

PG Calc | Your Partner In Planned Giving Success

Real people stories inspire us

- Your main goal is to engage people with an inspirational story of your donor!

The story inspires someone to engage, why?

- they realize people JUST LIKE THEM make planned gifts
- they can also really have an IMPACT!
- they receive the SELF-SATISFACTION of giving. Good feeling of making a difference.

©2023 PG Calc Donor-Centric Marketing 8

8

PG Calc | Your Partner In Planned Giving Success

It's not a question of should I use them, its...

WHERE to get them
HOW to write them
WHEN to use them
WHERE to use them

©2023 PG Calc Donor-Centric Marketing 9

9

PG Calc | Your Partner In Planned Giving Success

HOW do I get them

©2023 PG Calc Donor-Centric Marketing 10

10

PG Calc | Your Partner In Planned Giving Success

The first stories should be your **board**

- Get influential and powerful people in your organization to tell their story.
- Tell them benefits of storytelling for raising more money and increasing donor engagement.
- Explain that people are influenced by what others say and do. Sharing their personal nonprofit story allows you to leverage social proof that your mission is worth caring about.

©2023 PG Calc Donor-Centric Marketing 11

11

PG Calc | Your Partner In Planned Giving Success

Reach out to **donors** directly

- Consider a more direct approach as opposed to casting a wide net across multiple marketing channels.
- Ask you best donors.
- For volunteer stories, you could reach out to long-time volunteers or chat with your volunteer coordinator to find good contenders.
- With such a direct ask, make sure that the messaging around your request is friendly and personal. You wouldn't want them to feel like you sent it to your entire list, so make sure they know that it's the story only they can tell that you need.

©2023 PG Calc Donor-Centric Marketing 12

12

PG Calc | Your Partner In Planned Giving Success

Events are great for testimonials

- Request one to two sentence statement describing their involvement with your organization, whether they volunteered, donated, or attended an event.
- Follow up for feedback regularly with constituents, volunteers, donors, and other supporters.

Use your iPhone

©2023 PG Calc Donor-Centric Marketing 13

13

PG Calc | Your Partner In Planned Giving Success

Ask social followers for testimonials

- When sharing stories or quotes on social media, it's a great opportunity to let people know that you're looking for more!
- Depending on your mission and community on social media, followers may jump at the chance to be featured online.
- See someone new commenting on posts or participating in groups? Reach out to them and find out their story.

©2023 PG Calc Donor-Centric Marketing 14

14


PG Calc | Your Partner In Planned Giving Success

Donor survey

Two major benefits.

- Surveys help you gather testimonials quickly.
- They give respondents enough time to be thoughtful about their answers.

What about Baystate Health most inspires you?
Everyone has a unique story, and we would love to hear yours. Please use the space below to share your story about why you support Baystate.



©2023 PG Calc Donor-Centric Marketing 15

15

PG Calc | Your Partner In Planned Giving Success

Donor survey on websites

©2023 PG Calc Donor-Centric Marketing 16

16

PG Calc | Your Partner In Planned Giving Success

Remember to get both from the same donor

- If you get a donor testimonials, ask them later for a full donor story.
- You also can take great testimonials from your donor stories.

©2023 PG Calc Donor-Centric Marketing 17

17

PG Calc | Your Partner In Planned Giving Success

HOW to write them

©2023 PG Calc Donor-Centric Marketing 18

18

PG Calc | Your Partner In Planned Giving Success

Stories need structure

- Arrange your donor story in a way that attracts, engages, and inspires
- Who, what, when, where, and why
- Structure is important, because we want to capture the readers attention.

©2023 PG Calc Donor-Centric Marketing 19

19

PG Calc | Your Partner In Planned Giving Success

Start with the WHY - That is the hook.

Why did Jane Doe give a bequest?

- Did they receive a scholarship?
- Or did their family receive medical care?
- They were always passionate about the environment, and want to preserve it?
- They want to ensure other students get that same experience—even if they can't afford it.

This is the emotional linchpin.

©2023 PG Calc Donor-Centric Marketing 20

20

PG Calc | Your Partner In Planned Giving Success

Briefly include the WHAT [GIFT]

- What exactly did the donor do?
- Jane made a great decision to update her will and include a bequest to your Org.
- That's it. Keep it simple. You can talk about the gift vehicle separately.

Honoring the Bigham's History—and Its Future

The late Mrs. Jane Doe, a devoted philanthropist and member of the Bigham family, has passed away. She is survived by her husband, Mr. John Doe, and their three children. Mrs. Doe was a lifelong supporter of the Bigham Foundation and its mission to provide educational opportunities for underserved students.

In her will, Mrs. Doe has bequeathed a significant portion of her estate to the Bigham Foundation. This generous gift will ensure that the Foundation can continue to support students in need for many years to come.

How a gift annuity works


A gift annuity is a financial instrument that allows you to make a charitable contribution to a qualified organization and receive a fixed annual payment for a period of years. The payment is typically based on the value of the gift at the time it is made.

Advantages of a gift annuity

- You can receive a fixed annual payment for a period of years.
- The payment is typically based on the value of the gift at the time it is made.
- You can make a charitable contribution to a qualified organization.

©2023 PG Calc Donor-Centric Marketing 21

21

PG Calc | Your Partner In Planned Giving Success 


The WHO is not the focus

- A planned giving donor story isn't a biography.
- Just include anecdotal information about your donor... it relates to their connection to your organization.

"... said Jane Doe, who worked as a hospital administrator for the 20 years."

©2023 PG Calc Donor-Centric Marketing 22

22

PG Calc | Your Partner In Planned Giving Success 


Close the story loop

- End with WHY again
- Remind the readers what happens now.

"Jane now feels confident knowing future generations will continue to receive the same quality health care that saved his mother's life."

©2023 PG Calc Donor-Centric Marketing 23

23

PG Calc | Your Partner In Planned Giving Success 

Stories can be simple

- It doesn't have to be dramatic or very revealing.
- The hook can be as simple as,
 - "I give because once I met one homeless kid, I couldn't stop thinking about all the others"
 - or
 - "I want to give the next generation the same life changing experience that I had at this school."

It's is the hook your readers see themselves in.

©2023 PG Calc Donor-Centric Marketing 24

24

PG Calc | Your Partner In Planned Giving Success

Writing Tips

©2023 PG Calc Donor-Centric Marketing 25

25

PG Calc | Your Partner In Planned Giving Success

Use a questionnaire

Obtain most, if not all, the details before speaking with the donor.

Your follow up questions will elicit better testimonials.

COLUMBIA UNIVERSITY DONOR PROFILE QUESTIONNAIRE

Your personal history:

- 1) Name and current address:
- 2) Where did you grow up?
- 3) Why did you choose to attend Columbia University?
- 4) Please describe your experiences there. What were the most memorable?
- 5) What programs, activities, and organizations were you most involved in during your time at Columbia?
- 6) How have you been involved with Columbia since graduation?
- 7) What would you identify as the most important things you gained by attending Columbia?
- 8) Please describe your career after graduation.
- 9) Please tell me as much about your personal life as you wish to share. Family? Pets? Travel? Volunteering? Hobbies and personal interests?

Giving to Columbia:

- Please share your history of giving to Columbia. (No need to include dollar amounts.)
- 1) What type(s) of gifts have you made since graduation?
- 2) Why did you choose to make a legacy (planned) gift?
- 3) What type of gift did you choose to make? Why? (E.g., gift by will, gift by retirement account, charitable gift annuity, trust, gift of property?)
- 4) Why did you decide to make this type of gift?
- 5) What inspired you to make this important gift?
- 6) How do you hope Columbia will put your legacy gift to use?
- Many donors say they find that charitable giving to be a uniquely satisfying experience. Has that been the case for you? If so, in what way?
- What would you tell other alumni who are considering making a similar gift to Columbia?

©2023 PG Calc Donor-Centric Marketing 26

26

PG Calc | Your Partner In Planned Giving Success

Be firm but fair

- We give donors a two-week deadline, but donors typically respond when they are ready. You cannot force it.
- A soft touch is required. You can still let them know if things are running behind.

©2023 PG Calc Donor-Centric Marketing 27

27

PG Calc | Your Partner In Planned Giving Success

Start with a compelling headline

Grab your readers' attention - Make them want to read.

Making a Lasting Impact to Help Nourish Our Neighbors in Need

Helping Nurses Become the Best They Can Be

Giving is a Family Affair

A Lifelong Commitment to Strengthening the Jewish Future

Helping Students Who Need It Most, Long into the Future

©2023 PG Calc Donor-Centric Marketing 28

28

PG Calc | Your Partner In Planned Giving Success

Use encouraging words

The story is good news. It's positive. It should wake the reader up and make them feel better.

Stir their emotions with encouraging and persuasive words and adjectives

- Amazing Unforgettable
- Astonishing Life-changing
- Eye-opening Magical

©2023 PG Calc Donor-Centric Marketing 29

29

PG Calc | Your Partner In Planned Giving Success

Use appealing photos to complement your story



- Pictures draw the eye in a way that text can't.
- Work with donors to get photographs (or videos)
- Don't use stock photos.

Make the story come to life!

©2023 PG Calc Donor-Centric Marketing 30

30

PG Calc | Your Partner In Planned Giving Success

Don't be afraid to edit

- If a writer or donor gives you a story, make sure it fits your purpose.
- Edited for length, clarity, and voice.
- Extract testimonials for other marketing use.

©2023 PG Calc Donor-Centric Marketing 31

31

PG Calc | Your Partner In Planned Giving Success

WHEN to use them

©2023 PG Calc Donor-Centric Marketing 32

32

PG Calc | Your Partner In Planned Giving Success

All the time!

Well, it really depends on your community of donors.

©2023 PG Calc Donor-Centric Marketing 33

33

PG Calc | Your Partner In Planned Giving Success

WHEN?

One cohort responds when sent details

One cohort responds when sent emotion

©2023 PG Calc 34

34

PG Calc | Your Partner In Planned Giving Success

WHERE to use them

©2023 PG Calc Donor-Centric Marketing 35

35

PG Calc | Your Partner In Planned Giving Success

Everywhere!

Well... if we are improving our relationships then yes use them as much as you can.

©2023 PG Calc Donor-Centric Marketing 36

36

PG Calc | Your Partner In Planned Giving Success

Making communications more valuable

Are your current communications improving your donor relationships?

Each time you mail you are improving or weakening the relationship.

Many organizations are sending out uninspired newsletters that mean nothing to most donors, and jargon filled thank you letters that alienate donors more than they inspire.

Don't be this program.

©2023 PG Calc Donor-Centric Marketing 37

37

PG Calc | Your Partner In Planned Giving Success

Stories to the rescue

- Stories connect with donors.
- They see themselves in the actions of others
- Jealously perhaps?

Bottom line they are not boilerplate.
[They should be interesting]

Samples?

©2023 PG Calc Donor-Centric Marketing 38

38

PG Calc | Your Partner In Planned Giving Success

VIDEO with Stories

©2023 PG Calc Donor-Centric Marketing 39

39

PG Calc | Your Partner In Planned Giving Success

Video can impact your email or web pages

American Red Cross Legacy Society
Charitable Planning Impact and Update

Legacy Society Member Stories
Both our donors and the beneficiaries of their generosity have stories. Share their stories below.

Why Work for Service to the Armed Forces
For nearly 140 years, the American Red Cross has supported the United States military in conflict zones and other complex settings around the globe. We support service members and military-connected families by relaying urgent messages relating to the health and wellness of their family members and extended families. Learn what it takes to be a Red Crosser in this role and learn more by visiting redcross.org/af.

WATCH VIDEO

©2023 PG Calc Donor-Centric Marketing 40

40

PG Calc | Your Partner In Planned Giving Success

Establish a Lasting Legacy

Introduction to the 1913 Society - Dr. Timothy Johnson

1913 Society Roster

©2023 PG Calc Donor-Centric Marketing 41

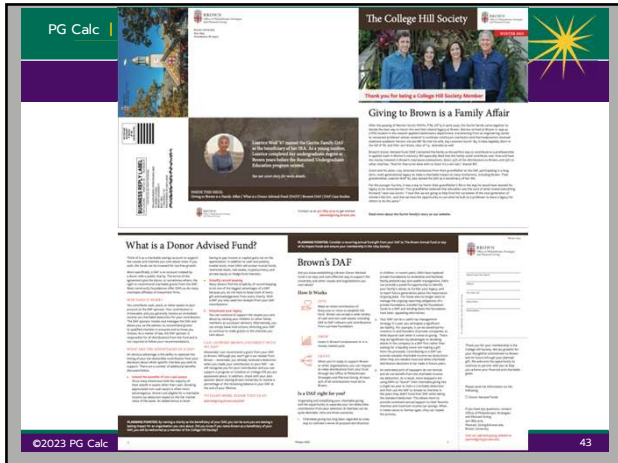
41

PG Calc | Your Partner In Planned Giving Success

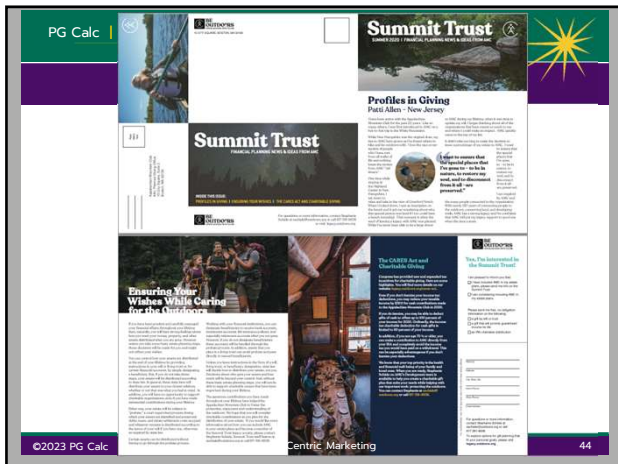
Newsletters with Stories

©2023 PG Calc Donor-Centric Marketing 42

42



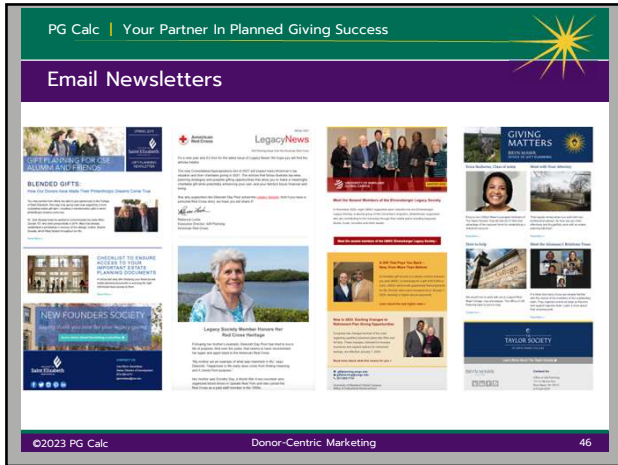
43



44



45



46



47



48

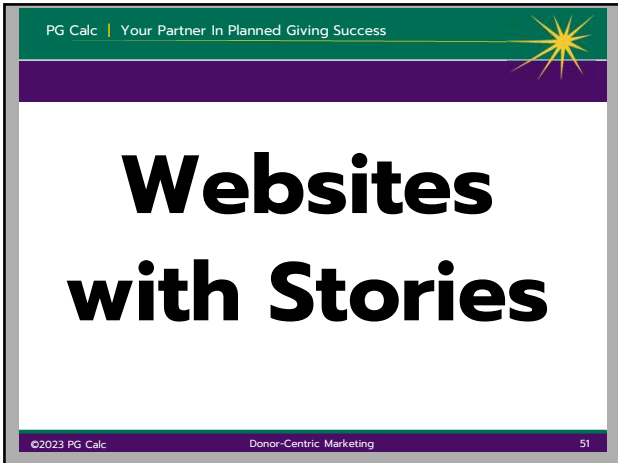




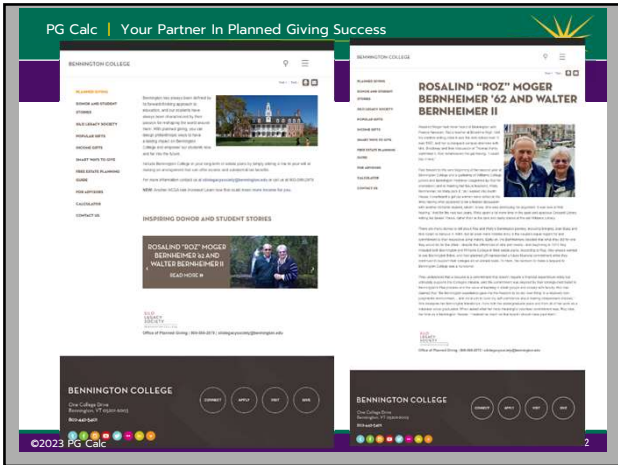
49



50



51



52



53



54

PG Calc | Your Partner In Planned Giving Success

ESTATE PLANNING DOESN'T HAVE TO BE DULL

How would you like to contribute?

- How to include the College of Saint Elizabeth in my estate plan.
- How to name the College of Saint Elizabeth as a beneficiary.
- How to include the College of Saint Elizabeth as a beneficiary.
- How to name the College of Saint Elizabeth as a beneficiary.
- How to include the College of Saint Elizabeth in my estate plan.

Name: _____
 Address: _____
 City: _____ State: _____ Zip: _____

Life is never dull!
 —Mary Jane Stroutter Gregory '188

LOVED TO TRAVEL THE WORLD.

LEFT HER LEGACY AT THE COLLEGE OF SAINT ELIZABETH.

Why Jane wanted St. Elizabeth's College?
 Jane wanted to leave a legacy for the education of young women who would help advance the world's progress in the fields of Science, Arts, Letters, History, and Health.

She also has the ability to make a difference in the lives of young women who will help advance the world's progress in the fields of Science, Arts, Letters, History, and Health.

New Founders Society
 Let us help you meet Our New Founders Society's needs and know who have their estate plan.

Let Mary Jane's legacy live on by making a gift to the College of Saint Elizabeth's New Founders Society. Contact us today at 610.221.1211 or www.collegeofst-elizabeth.edu

55

55

PG Calc | Your Partner In Planned Giving Success

Help Shape Our Future

How would you like to contribute?

- How to include B&N in my estate plan.
- How to name B&N as a beneficiary.
- How to include B&N in my estate plan.

Name: _____
 Address: _____
 City: _____ State: _____ Zip: _____

// Sending me to B&N was a huge source of pride for my mother, a single parent. //
 —Mark Leeds '83

CREATE YOUR LEGACY

CREATE A LEGACY THAT CHANGES LIVES

THE ALMY SOCIETY

©2023 PG Calc Donor-Centric Marketing 57

56

PG Calc | Your Partner In Planned Giving Success

Social Media with Stories

©2023 PG Calc Donor-Centric Marketing 57

57

PG Calc | Your Partner In Planned Giving Success

Use social to show mission stories

Charity: Water uses Instagram to tell the stories of families who have been given access to clean drinking water.



The screenshot shows an Instagram post from the account 'charitywater'. The main image is a group of people, including men, women, and children, sitting together in a rural, possibly brick-walled setting. The caption reads: 'Family in Mozambique in Moz. And how that they have clean water, he gets to spend more time with his...'. There are several comments and a heart icon visible on the post.

©2023 PG Calc Donor-Centric Marketing 58

58

PG Calc | Your Partner In Planned Giving Success

Social is made for donor stories



The screenshot shows a webpage for 'COLUMBIA | 1754 SOCIETY Impact Makers'. The page features a collage of photos of diverse people. Below the images, the text reads: 'Giving Back, Giving Forward, and Leaving Your Legacy. When you make a legacy gift to Columbia, you pave the way for future generations to be inspired, feel empowered, and ultimately to flourish. It can completely transform the heights Columbia students, faculty and researchers can reach. Donors are a diverse group with uniquely personal reasons for supporting the university. Explore their stories and experience the impact a single gift can have on the future of Columbia, and the world.' Below this is a section titled 'Impact Makers'.

©2023 PG Calc Donor-Centric Marketing 59

59

PG Calc | Your Partner In Planned Giving Success

Don't do this



The screenshot shows a financial planning article. The main heading is 'REDUCE TAXES WITH ESTATE PLANNING'. The article text includes: 'Preserving your wealth through an efficient estate plan is a powerful strategy for ensuring that your assets pass on to your heirs without unnecessary financial burdens. At Paul Law Firm's hand, we specialize in crafting estate plans that leverage strategic tools to minimize the impact of estate taxes.' Other sections include 'Discover Tax Efficient Strategies', 'Personalized Consultation', and 'Navigate the Tax Landscape with Confidence'. There is also a 'Call us now' button and a 'Read on our blog' link.

©2023 PG Calc Donor-Centric Marketing 60

60

PG Calc | Your Partner In Planned Giving Success

Testimonials

What about Testimonials?

©2023 PG Calc Donor-Centric Marketing 61

61

PG Calc | Your Partner In Planned Giving Success

Testimonials motivate action

Just like the donor story

- Supporters look for themselves in testimonials, and when they find one that they can personally relate to, that can clinch the deal.
- For marketing, you'll thank yourself for building up a stockpile to use as needed.

©2023 PG Calc Donor-Centric Marketing 62

62

PG Calc | Your Partner In Planned Giving Success

Who gives them

They come from a wide variety of people involved with your cause, including:

- volunteers
- staff
- donors
- benefactors

©2023 PG Calc Donor-Centric Marketing 63

63

PG Calc | Your Partner In Planned Giving Success

Just like donor stories

- Headshots
- Videos
- Audio

Make them come to life

Samples?

©2023 PG Calc Donor-Centric Marketing 64

64

PG Calc | Your Partner In Planned Giving Success

Brochures with Testimonials

©2023 PG Calc Donor-Centric Marketing 65

65

PG Calc | Your Partner In Planned Giving Success

TAKE THE NEXT STEP

Join the JOURNEY

CELEBRATE 75 YEARS OF MINISTRY BY INVESTING IN THE FUTURE

Christian Camps and Conferences

JOIN THE JOURNEY THROUGH YOUR LEGACY

1944 HERITAGE SOCIETY

GIFTS BY BEQUEST

GIFTS OF RETIREMENT ASSETS

GIFTS OF LIFE INSURANCE

©2023 PG Calc Donor-Centric Marketing 66

66

PG Calc | Your Partner In Planned Giving Success



Consider a Lifesaving Legacy

When it comes to making an impact, there is no greater legacy than saving a life. Planned giving allows you to make a lasting impact on the lives of others, while also providing a significant benefit to your family.

We are here to help!

Planned giving is a complex process, but we are here to help you navigate it. Our experts can guide you through every step, from identifying the right asset to completing the paperwork.

The Legacy Society

Supporting research and medical care is a top priority for us. By joining our Legacy Society, you can help us continue to provide exceptional care to our patients.

Your Enduring Legacy

A lasting impact on the future of Brynastu Health. Your planned giving can help us continue to improve the lives of our patients for years to come.

One generation in your will could make a lifetime of difference.

By making a gift to Brynastu Health, you can help us continue to provide exceptional care to our patients, while also providing a significant benefit to your family.

Gift of a Lifetime

When it comes to making an impact, there is no greater legacy than saving a life. Planned giving allows you to make a lasting impact on the lives of others, while also providing a significant benefit to your family.

Gift of a Lifetime

When it comes to making an impact, there is no greater legacy than saving a life. Planned giving allows you to make a lasting impact on the lives of others, while also providing a significant benefit to your family.

©2023 PG Calc Donor-Centric Marketing 67

67

PG Calc | Your Partner In Planned Giving Success



Create Your Legacy

When it comes to making an impact, there is no greater legacy than saving a life. Planned giving allows you to make a lasting impact on the lives of others, while also providing a significant benefit to your family.

Gifts that Give You Lifetime Income

When it comes to making an impact, there is no greater legacy than saving a life. Planned giving allows you to make a lasting impact on the lives of others, while also providing a significant benefit to your family.

Gifts that Give You Lifetime Income

When it comes to making an impact, there is no greater legacy than saving a life. Planned giving allows you to make a lasting impact on the lives of others, while also providing a significant benefit to your family.

©2023 PG Calc Donor-Centric Marketing 68

68

PG Calc | Your Partner In Planned Giving Success



Newsletters with Testimonials

©2023 PG Calc Donor-Centric Marketing 69

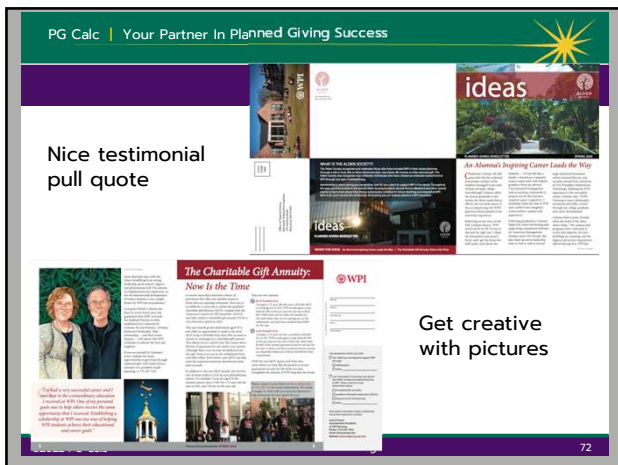
69



70



71



72

PG Calc | Your Partner In Planned Giving Success

Self-Mailers with Testimonials

©2023 PG Calc Donor-Centric Marketing 73

73

PG Calc | Your Partner In Planned Giving Success

Tell Me More

I would like to learn more about:

- Gifts by Will or Trust
- Charitable Gift Announcements
- Charitable Designations
- All Charitable Lifetime Contributions

I have already included Seabury in my estate plan.

Name: _____
Address: _____
City/State/Zip: _____
Phone: _____
E-mail: _____

LEAVE A LEGACY THAT CHANGES LIVES

As one whose ministry is pastoral care, I observe firsthand how Seabury Charitable Foundation cares for those whose own resources have been depleted. I am knowing that my gift will also help provide that ongoing support.

— Captain M. Wilson

HELPING THOSE IN NEED

Informed in 1978 when the Church Home of Holbrook was incorporated in Seabury, Oregon, and later merged with the Church Home of Seabury, Oregon. Through the years, the Church Home Seabury has provided the highest quality of the highest level of care and attention for Residents and Visitors. Through Seabury Charitable Foundation, Seabury Charitable Foundation may contribute to help those in need by providing the help you need.

Your gift may come in many forms:

- Include the KIP in your will or trust.
- Establish a Charitable Gift Annuity and receive income for life.
- Designate the KIP as a beneficiary of your retirement account.

Whether gift here you choose, your gift will make a difference. Seabury Charitable Foundation provides comprehensive care and attention for our residents and guests. We hope that your gift will make a difference in our lives.

Seabury Charitable Foundation
808 E. 10th Street
Seabury, Oregon 97138
www.seaburycharitable.org

THE SEABURY LEGACY SOCIETY

Seabury Charitable Foundation (Seabury) has established the KIP in many states. Seabury Charitable Foundation provides comprehensive care and attention for our residents and guests. We hope that your gift will make a difference in our lives.

If you have chosen the KIP as your gift, we will be glad to have your name on the list and welcome you as a member.

74

PG Calc | Your Partner In Planned Giving Success

TELL ME MORE

Charitable gifts are a great way to make a difference in the lives of those in need. If you are 70 or older, you can make a gift to South Texas College of Law. Your gift will make a difference in our lives.

Name: _____
Address: _____
City/State/Zip: _____
Phone: _____
E-mail: _____

TAX-SMART GIVING FROM YOUR IRA

This year, I made a donation to South Texas through a qualified charitable distribution from my IRA. It is an easy way to make a gift without an additional tax burden. It really is a win-win. I hope that others will find what I found at South Texas.


— Jerry Sackey '11

CREATE YOUR LEGACY WITH RETIREMENT ASSETS

Your gift will change lives.

75

PG Calc | Your Partner In Planned Giving Success






Inserts with Testimonials

©2023 PG Calc Donor-Centric Marketing 76

76

PG Calc | Your Partner In Planned Giving Success

©2023 PG Calc Donor-Centric Marketing 77

77

PG Calc | Your Partner In Planned Giving Success



Postcards with Testimonials

©2023 PG Calc Donor-Centric Marketing 78

78

PG Calc | Your Partner In Planned Giving Success

Work with what you got

This screenshot displays the "Planned Giving Testimonials" page. It features three individual testimonial cards. Each card includes a photograph of the donor and a short narrative about their giving experience. The donors featured are Mildred Carroll, Esther D. Curtwright, and Joan Marlowe Golan. The page layout includes a navigation menu at the top, a sidebar with links to various topics, and a footer with copyright information and a marketing attribution.

©2023 PG Calc Donor-Centric Marketing 82

82



PG Calc | Your Partner In Planned Giving Success

Gifts by Will or Living Trust

This screenshot shows a content page titled "Gifts by Will or Living Trust". The page contains text, several photographs of donors, and a video player at the bottom. A prominent callout box on the right side of the page contains the text: "Weave in testimonials or stories on the content pages." The page design is consistent with the other screenshots, featuring a header, navigation, and footer.

©2023 PG Calc Donor-Centric Marketing 83

83



PG Calc | Your Partner In Planned Giving Success

Website download: Estate Planning Guide

This screenshot displays the "Estate Planning Guide" download page. It features three main sections, each with a photograph and accompanying text. The sections are: "Touching the Future" with a photo of a woman and a man, "Three Pillars of Every Estate Plan" with a photo of a woman and a man, and another section with a photo of a man and a woman. The page includes a header, a navigation menu, and a footer.

©2023 PG Calc Donor-Centric Marketing 84

84



PG Calc | Your Partner In Planned Giving Success




Legacy Society

©2023 PG Calc Donor-Centric Marketing 85

85

PG Calc | Your Partner In Planned Giving Success




The Legacy Society

THE BELL SOCIETY

WHY BECOMING A MEMBER MATTERS

TALK TO US



It's an exclusive club.


Your legacy society should provide an opportunity for your donors to spend time with other donors.

These donors are your most passionate and committed supporters.

©2023 PG Calc Donor-Centric Marketing 86

86




PG Calc | Your Partner In Planned Giving Success



BELL SOCIETY FALL LUNCHEON

SAVING THE BELL SOCIETY

PLANNED GIVING AND THE BELL SOCIETY

The social gatherings help reinforce the idea that making the planned gift was a good idea.


Introducing them to others who have made the same type of commitment reinforces their own commitment.

©2023 PG Calc Donor-Centric Marketing 87

87

PG Calc | Your Partner In Planned Giving Success

Which brings us back to this...




©2023 PG Calc Donor-Centric Marketing 91

91

PG Calc | Your Partner In Planned Giving Success

Who we are



©2023 PG Calc Donor-Centric Marketing 92

92



PG Calc | Your Partner In Planned Giving Success

Donor video

If you are interested in making a legacy gift of any kind to our church, please get in touch with [Rev. David Thomas, Director of First Ministries](#). Whether it's to reach out to us to share your plans, let us know what you are considering or just to state a confidential, non-obligation conversation about what's possible, we would love to hear from you.

Thank you for considering a legacy gift to First Congregational Church of Palo Alto.

Build the future!

©2023 PG Calc Donor-Centric Marketing 93

93

PG Calc | Your Partner In Planned Giving Success

Nice job First Congregational Church of Palo Alto!

Legacy Testimonials



"I have been a member of the First Congregational Church of Palo Alto for many years. I have always been impressed by the quality of the staff and the level of care they provide. I recently worked with PG Calc on a planned giving arrangement and was very satisfied with the results. The staff was professional, knowledgeable, and helpful throughout the entire process. I highly recommend PG Calc to anyone looking for a partner in planned giving success."

"I have been a member of the First Congregational Church of Palo Alto for many years. I have always been impressed by the quality of the staff and the level of care they provide. I recently worked with PG Calc on a planned giving arrangement and was very satisfied with the results. The staff was professional, knowledgeable, and helpful throughout the entire process. I highly recommend PG Calc to anyone looking for a partner in planned giving success."

"I have been a member of the First Congregational Church of Palo Alto for many years. I have always been impressed by the quality of the staff and the level of care they provide. I recently worked with PG Calc on a planned giving arrangement and was very satisfied with the results. The staff was professional, knowledgeable, and helpful throughout the entire process. I highly recommend PG Calc to anyone looking for a partner in planned giving success."




©2023 PG Calc Donor-Centric Marketing 94

94

PG Calc | Your Partner In Planned Giving Success

Still Have a Question?

Contact: Andrew Palmer
 Email: apalmer@pgcalc.com
 Phone: 888-497-4970

©2023 PG Calc Donor-Centric Marketing 95

95
