

PG Calc | Your Partner In Planned Giving Success 


Bequest Marketing Everyone Should Do



Date: November 19, 2020
 Time: 1:00 – 2:30 Eastern Time
 Presenter: Andrew Palmer
 Director of Marketing Services
 PG Calc


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Introduction

The main reason people don't leave a bequest is they aren't asked.



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Agenda

This discussion will focus on:

- Planning
- Messaging
- Tactics



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Let's Go!

Giving USA 2020 Annual Report:

Americans gave a record \$449.64 billion.


Bequest receipts were 10% or \$43.21 billion.

What is your plan?



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Create a Plan


The basic component parts:

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




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Factors to Consider

- How much can you afford to spend each fiscal year? [Budget]
- Your target donors
- Marketing schedule
- Be consistent




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Constant Cultivation

Follow your plan



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Life Events Dictate Giving

- the birth of a child or grandchild
- the sale of a business
- retirement
- death of a spouse
- etc.

Impossible to predict who will experience a cash infusion or loss that requires reallocation of assets.



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Find Your Audience

- Planned gift donors
- Consistent annual fund donors
- No children and/or heirs
- Over 65
- Engaged board members

FLAG: Frequency of giving, Longevity of giving to the organization, Age, Giving history.




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Donor Surveys

Allow donors to self-identify as prospects and unrecognized legacy society members




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Messaging

Branding and Imagery +
Educate and Awareness =
Credibility



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Messaging

- Benefits to the donor
- Self-satisfaction of giving
- Impact the gift

Less on the technical aspects.
Keep the messaging simple.



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See Russell James

Stay away from formal and technical terms:

"A gift from your will"

vs.

"Bequest."



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Donor Stories

Stories and testimonials of like-minded individuals supporting the organization into the future and hearing them express the self-satisfaction of giving is powerful.

Personal compelling narratives establish credibility.



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COVID-19

Messaging is now a bit more complicated.

But we must keep marketing.




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Don't Be Tone Deaf

Empathy



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Overly Cautious

"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."

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Permission

"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."

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We Are Here...

"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."

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In Times Like These...

"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."

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Share Life in a Pandemic

If you are in a health-related field...

Don't shy away from showing donors what your organization is dealing with, has achieved, or will encounter in the future.


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Tactics

Some examples...




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Existing Assets

- Checkboxes on reply envelopes
- Annual report
- Newsletters
- Facebook page
- Letterhead and business card
- Internal telephone callers
- Board



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Temple Sinai High Holy Day Legacy Campaign

During these High Holy Days, we stop and ponder our purpose and the legacy of our lives, as we remember the legacy of those who come before us. Personally, our priority is to secure the future of our families and causes important to us. We humbly ask you to consider too using Temple Sinai legacy to secure a progressive Jewish future in Vermont!

If you are interested in exploring a legacy gift to Temple Sinai, call Stacie Gubert at (802)682-8125 or email administrator@templesinaivt.org.

Help us make sure that what we've built continues l'dor vador, from generation to generation.



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Magazine Ad

USE YOUR IRA TO MAKE A TAX-SMART GIFT

MAXIMIZE YOUR IMPACT...

• You can donate up to \$100,000 per year from your IRA to a qualified charity.

• You can make a tax-deductible gift of up to \$100,000 per year from your IRA to a qualified charity.

• You can make a tax-deductible gift of up to \$100,000 per year from your IRA to a qualified charity.

• You can make a tax-deductible gift of up to \$100,000 per year from your IRA to a qualified charity.

What legacy will you leave?

At this time, your family is the most important part of your life. It's time to think about the legacy you will leave behind.

ST. SEBASTIAN'S SCHOOL
Rev. Charles D. McLean, S.J., S.T.D.

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Direct Mail

- Constant cultivation is a key.
- Your older donors will respond on an emotional level.
- Younger donors will respond because this is something different.
- Must be tailored to your mission.

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Carnegie Mellon University

Dear Dr. Clay,

Members in celebration from strong and members from a gift work hard and work on the team, we are focused on the world's toughest problems. — Bill Foy, Ph.D., Mellon College of Science, 1985 and '12, De. Terman.

We are proud of the members of our "strong" members. Many of them have been able to continue to help the world's toughest problems. Our members and their members' needs are not a one-time investment. Thank you for your time, your passion, and for the financial support you provide which directly helps us solve the world's toughest problems.

We want to share with you a unique planning opportunity that benefits both you and CMU. If you have the option, please consider the most significant advantage of a will. This flexible and often flexible program and the deduction benefits that you will be providing long-term financial support to your designated program at CMU. For example, if you have the option to make a gift through your will, you can:

- **Eliminate Payments:** An annual rate of 1.5%, providing \$100 annually.
- **Receive Tax Deductions:** A total of one tax deduction of approximately \$10,000. Be the first to make a gift!

For more information on this unique opportunity, please contact your advisor or call us at 412-268-1111. We are happy to help you make a gift that will make a difference.

The above figures are for the average person and may vary from those shown here depending on your age and the timing of your gift. For more information about this or other giving opportunities, please contact the individual help card or call us at 412-268-1111.

Once again, thank you for your continued support of CMU.

With appreciation,

Joseph D. Bell, III
Executive Director of Gift Planning
jbell@cmu.edu

37,000
Members in celebration from strong and members from a gift work hard and work on the team, we are focused on the world's toughest problems. — Bill Foy, Ph.D., Mellon College of Science, 1985 and '12, De. Terman.

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CREATE YOUR LEGACY

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When you make a gift to Teaneck-Coral-Horsene through your will, estate or financial plans, you are helping provide compassion and hope and grief support to your loved ones, friends, neighbors and future generations to come. By choosing in-estate-of-all-care in our community you are leaving a legacy of generosity that reaches to our neighbors, regardless of ability to pay. The answer to comfort and support during their final days.

IF YOU WANT TO...

- Keep control of your assets while your lifetime and making a gift that provides an estate tax deduction.
- Exercise tax or capital gains and receive an immediate deduction of full market value.
- Provide to your estate assets paying income taxes on and measure distributions for your husband's IRA account.
- Leave more for family by making a gift from the most "safe" asset available (avoiding income tax and reducing estate tax).
- Make a gift with no cost to you while retaining a parent's income tax charitable deduction.

GIFTS TO CONSIDER

- Inherit Teaneck-Coral-Horsene Foundation in your will or trust.
- Contribute long-term appreciated stock or securities.
- Use your IRA to make a qualified charitable distribution (not transfer up to \$10,000 annually directly to Teaneck-Coral-Horsene Foundation, see here).
- Name Teaneck-Coral-Horsene Foundation as a beneficiary of your IRA or tax-qualified retirement plan.
- Consider ownership of a life insurance policy you no longer need.

If you would like to learn more, please visit: plannedgiving.tenhu.org

For Assistance, please contact:
Ashley Haughton | 772-492-4504 | a.haughton@tenhu.org

Teaneck-Coral-Horsene Foundation
1001 S. Lakeside Avenue
Suite 1, Lakeland, FL 33709-4000

TEANECK-CORAL-HORSENE FOUNDATION

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Self-Mailer

TELL ME MORE

I would like more information about:

- Making a bequest to me
- Charitable Contribution Deduction
- Financially Beneficial Charitable Deduction

I am already financially contributing to the foundation.

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

THE FUTURE STARTS HERE

LEGACY


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Digital Outreach

- Quickest and most cost-effective way of conveying your bequest giving message.
- Not always the most effective.
- Email should be well-written, personal, and a benefit to your donors.
- Builds relationships faster.




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Website



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LegacyNews

It's never been so easy to be a hero. You'll be happy to hear that the latest legacy news is...

The new Gates Estate Opportunity for Red Cross is the latest in our series of...

Don't miss out on this opportunity. Act now to secure your place in this exciting...

For more information, visit [http://www.redcross.org/legacy](#) or call 1-800-RED-CROSS.

Signature
 Barbara Lopez
 Executive Director, Gift Planning
 American Red Cross



Are you ready for some certainty?

A Charitable Gift Annuity provides you guaranteed income for life!

A charitable gift annuity provides a fixed payment for the remainder of your contribution to...

The annual rate is based on the age when you make your gift. The payment is fixed and does not change for the remainder of your lifetime.

Additional gifts will increase your annual payment. For more information, visit our website...

Let us show you how a charitable gift annuity can provide certainty for you. Contact Barb at...

[1-800-RED-CROSS](#)

AMERICAN RED CROSS

Contact Us
 1-800-RED-CROSS
www.redcross.org/legacy
 1-800-370-3800

Roger and Jones - Helping to Keep the Red Cross Alive!

Legacy gifts are the most powerful way to support the American Red Cross. They help us...


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Recognition Society

It ensures that planned giving donors are thanked, recognized, and stewarded.

- Strengthens the relationship your donors.
- Identify donors who have made an intention.
- Recognizing gifts will inspire others in your community to follow their leadership.




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Bequest Marketing Is Not Complicated

- Be persistent and consistent in your communication.
- Be sensitive to changes in a donor's life circumstances.
- Just don't stop marketing.
- Be proactive.
- Remember, patience is a virtue.




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Questions?



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Still Have a Question?

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

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