



Marketing Planned Gifts - Q&A Webinar



Date: December 13, 2023
Time: 1:00pm Eastern Time
Presenter: Andrew Palmer
Director of Marketing Services
PG Calc



1.

How does annual fund marketing differ from planned gift marketing?



2.

How much time should I spend on planned giving versus annual fundraising?



3.

How often should we send marketing messages?



4.

At what times of year are different planned giving options best marketed?



5.

What is the best marketing channel for planned gifts?



6.

What do you recommend for an org's first foray into marketing planned gifts, and how wide of a net of prospects?



7.

Suggestions for how to segment members/donors in the database who are not currently ID'd with a planned gift?



8.

Should we start marketing
on social media?



9.

What's the best way to incorporate younger audiences in your marketing?



10.

What is the strongest CTA?

Any recommendations for increasing responses?



11.

What is considered a healthy response rate for print and digital marketing?



12.

Is it better to have general contact information for “the office” on marketing pieces or is it better to have a direct department contact listed, director or otherwise?



13.

What words should I avoid?



14.

How do you collect age/birth date information for more targeted marketing efforts?



15.

Who are the best prospects to receive CGA marketing?

Is there a recommended time of year to market them?



16.

There are only so many ways to write about CGAs, CRUTs, QCDs, etc. How do you keep the copy unique and engaging each time?



17.

Sending QCD reminders - is this a good idea? What format (postcard, email, newsletter, mailing or all of the above?)
And, When?



18.

What tactics would you recommend to engage financial advisors and other professionals to generate referrals?



19.

What are you seeing with clients in terms of identifying new PG prospects to include in marketing efforts?



20.

What's the most captivating ROI I can share up and out regarding PG Marketing?



Still Have a Question?

Contact: Andrew Palmer
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