

PG Calc | Your Partner In Planned Giving Success

Marketing Planned Gifts - Q&A Webinar



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

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1.

How does annual fund marketing differ from planned gift marketing?

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2.

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

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3.

How often should we send marketing messages?

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4.

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

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5.

What is the best marketing channel for planned gifts?

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6.

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

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7.

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

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8.

Should we start marketing on social media?

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9.

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

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10.

What is the strongest CTA?

Any recommendations for increasing responses?

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11.

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

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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?

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13.

What words should I avoid?

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14.

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

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15.

Who are the best prospects to receive CGA marketing?

Is there a recommended time of year to market them?

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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?

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17.

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

And, When?

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18.

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

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19.

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

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20.

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

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Still Have a Question?

Contact: Andrew Palmer
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