


PG Calc | Your Partner In Planned Giving Success

**Marketing in the Age of Trump**



Date: December 20, 2018  
 Time: 1:00 - 2:30 Eastern Time  
 Presenter: Andrew Palmer  
 Director of Marketing Services  
 PG Calc

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**I Am Asked All The Time...**

What's new?



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**Same Old Stuff ...**

- Visual website
- Don't overwhelm your audience
- Content marketing
- Social media
- Video
- Mobile marketing

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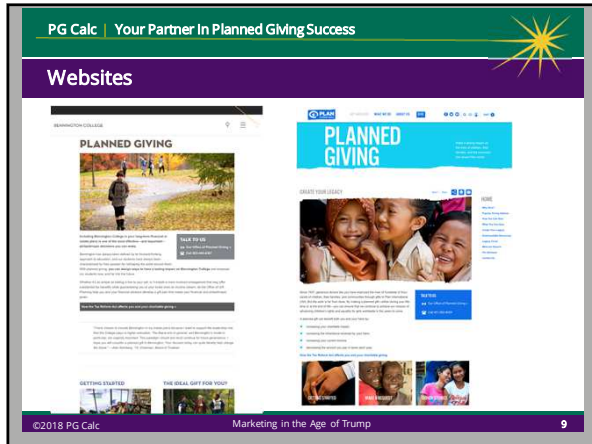
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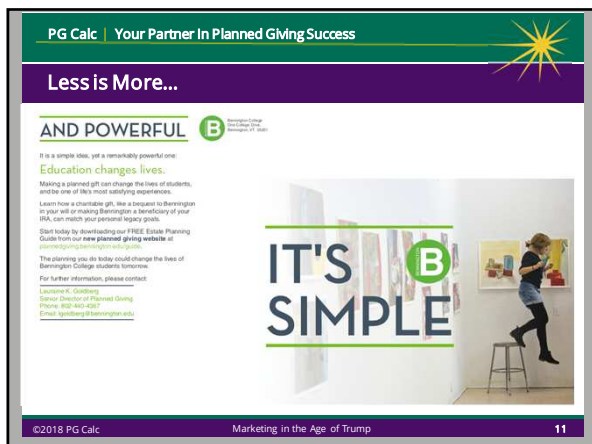
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## Direct Mail: Stand Out From the Crowd

- Large pieces command attention.
- Despite the significant postage savings from mailing smaller-sized pieces that fit USPS standards for automated processing, large direct mail gets a better response.
- Try Humor...

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## Grab Their Attention...



**Higher Gift Annuity Rates Mean More Income For You**

Let's say you're looking for ways to reduce your taxable income and you're considering a gift annuity. You might be surprised to learn that the rates for gift annuities have increased significantly in recent years. This means you can receive a higher income for the same amount of gift.

Rate	2017	2018
10%	4.5%	5.5%
15%	6.5%	7.5%
20%	8.5%	9.5%

For more information, contact your advisor or call 1-800-368-7777.

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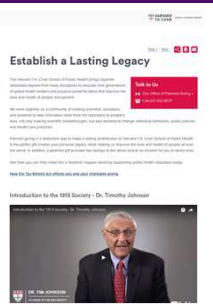
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## Use Video...

- Video of inspiring stories create great emotion
- Simple production with strong content



**Establish a Lasting Legacy**

The Robert R. O'Neil Foundation is proud to announce the launch of its new video series, 'Establish a Lasting Legacy'. This series features inspiring stories of individuals who have made a significant impact on their communities through their philanthropic efforts.

Watch the full video on YouTube: [https://www.youtube.com/watch?v=...](#)

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**Mobile...**

- Use of mobile awareness is growing every year.
- From 5% to 15% in the past 5 years.

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**Test Social Media**

- Use impact stories
- Event tie-Ins (stewardship)
- Surveys
- Manage expectations

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**But This Is Not All New...**

What about new campaigns for planned giving?

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## ACGA Rate Increase

Marketing opportunity

- Website
- Newsletter
- Direct mail
- Email



Higher gift annuity rates mean more income for you

This may be particularly beneficial in an environment in which college costs are rising. While the average cost of college has risen 36% since 1980, the average cost of a private college has risen 67%. Higher gift annuity rates mean more income for you. The average gift rate for a \$100,000 gift with a 5% annuity rate is \$5,000. Cash and appreciated securities are common funding sources. Be an adult benefit when you fund the gift with appreciated securities on children's birthday gifts.

Age	65	66	67	68	69	70	71	72	73	74	75
Gift Rate	6.6%	6.7%	6.8%	6.9%	7.0%	7.1%	7.2%	7.3%	7.4%	7.5%	7.6%
Gift Rate	6.7%	6.8%	6.9%	7.0%	7.1%	7.2%	7.3%	7.4%	7.5%	7.6%	7.7%
Gift Rate	6.8%	6.9%	7.0%	7.1%	7.2%	7.3%	7.4%	7.5%	7.6%	7.7%	7.8%
Gift Rate	6.9%	7.0%	7.1%	7.2%	7.3%	7.4%	7.5%	7.6%	7.7%	7.8%	7.9%
Gift Rate	7.0%	7.1%	7.2%	7.3%	7.4%	7.5%	7.6%	7.7%	7.8%	7.9%	8.0%
Gift Rate	7.1%	7.2%	7.3%	7.4%	7.5%	7.6%	7.7%	7.8%	7.9%	8.0%	8.1%
Gift Rate	7.2%	7.3%	7.4%	7.5%	7.6%	7.7%	7.8%	7.9%	8.0%	8.1%	8.2%

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## It's a Better Investment...

A GIFT THAT PAYS YOU BACK (Rates start increasing July 1)

Lasell College

854 Gloucester Avenue  
Boston, MA 02188

If you're looking for ways to support your child's education or create income ahead of a charitable gift annuity, Lasell may be your answer. A charitable gift annuity is a unique financial instrument you fund with cash or securities for a gift of \$10,000 or more. Lasell will provide guaranteed annual payments for life. Lasell's endowment fund provides higher rates than other gift annuities. Higher rates mean higher annual payments.

Age	65	66	67	68	69	70	71	72	73	74	75
Gift Rate	6.6%	6.7%	6.8%	6.9%	7.0%	7.1%	7.2%	7.3%	7.4%	7.5%	7.6%
Gift Rate	6.7%	6.8%	6.9%	7.0%	7.1%	7.2%	7.3%	7.4%	7.5%	7.6%	7.7%
Gift Rate	6.8%	6.9%	7.0%	7.1%	7.2%	7.3%	7.4%	7.5%	7.6%	7.7%	7.8%
Gift Rate	6.9%	7.0%	7.1%	7.2%	7.3%	7.4%	7.5%	7.6%	7.7%	7.8%	7.9%
Gift Rate	7.0%	7.1%	7.2%	7.3%	7.4%	7.5%	7.6%	7.7%	7.8%	7.9%	8.0%
Gift Rate	7.1%	7.2%	7.3%	7.4%	7.5%	7.6%	7.7%	7.8%	7.9%	8.0%	8.1%
Gift Rate	7.2%	7.3%	7.4%	7.5%	7.6%	7.7%	7.8%	7.9%	8.0%	8.1%	8.2%

To learn more and calculate your personalized benefits, visit [www.lasell.edu/gift-annuity](http://www.lasell.edu/gift-annuity)

For more information contact:  
Rebecca Stenard, Advancement Officer  
617-243-2152, [rstenard@lasell.edu](mailto:rstenard@lasell.edu)

HELP MAKE A DIFFERENCE

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## The New Tax Law and Charitable Giving

Fight misinformation

- Website
- Newsletter
- Direct mail
- Email



The Tax Reform Act and Charitable Giving

How will the new tax law affect you and your charitable giving?

What is the new tax law? The Tax Reform Act of 2017, which took effect on January 1, 2018, has many changes to the way we pay taxes. Some of the changes that affect charitable giving include:

- Charitable deduction limit: The maximum amount of cash and appreciated securities you can deduct for a year is now capped at 30% of your adjusted gross income (AGI).
- Charitable deduction phase-out: The deduction is phased out for high-income earners. For 2018, the deduction is reduced for AGI over \$280,000 for single filers and \$312,500 for married couples filing jointly.
- Charitable deduction suspension: The deduction is suspended for AGI over \$480,000 for single filers and \$540,000 for married couples filing jointly.
- Charitable deduction suspension phase-out: The deduction is phased out for AGI over \$480,000 for single filers and \$540,000 for married couples filing jointly.

Be sure to consult with your advisor for more information on how the new tax law will affect your charitable giving. For more information, visit [www.pgcalc.com](http://www.pgcalc.com)

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Anything Game Changing?

Radical?  
Outside the box?

A new way of thinking about planned giving marketing?

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I Thought About It and then Asked Myself...

How did a business person with no political experience propel himself to upset one of the world's most-experienced politicians?

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The Answer Is...

**Marketing**

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Please Note:

This is an APOLITICAL presentation



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A Learning Moment...

As Marketer, this was GENIUS.

- ✓ Apply the new
- ✓ Reaffirm what we know but perhaps don't stress
- ✓ A shake up of your marketing might be a good thing

Disclaimer: We recognize much of the success is based on the use of social media, but since it does not apply to PG we will tread lightly.

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1. Throw Rules Out of the Window

He broke every rule and norm!

- ✓ Don't settle for "this is what we always do"
- ✓ Ready... FIRE! ...Aim
- ✓ Test new ideas
- ✓ Is it time to re-think your marketing?

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## 2. Consistency and Repetition Is Key

- Stay in the news, and in people's thoughts.
- He had a constant flow of messages, combined with a real voice. (Plays into his audience, who believe he is being authentic.)
- Today people are looking for the humanity behind the content.

- ✓ **Constant cultivation**
- ✓ **Make sure your words or message don't sound robotic. This is an important way to connect with your audience.**

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## 2. Lather, Rinse, Repeat #MAGA

- Don't underestimate the power of a good slogan, no matter how cheesy it is.
- Just Do It | Think Different | A Diamond is Forever | Got Milk?
- Repeating phrasing can be very effective:
  - ✓ We're gonna start winning!
  - ✓ The \_\_\_\_\_ is a disaster.
- Phrases, when repeated enough, become truth for people.

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## 2. Use Repetition in Your Marketing

- The repetition and consistency of his message worked.

- ✓ **Repeat similar phrases consistently throughout your website and marketing campaigns.**
- ✓ **Phrases serve the purpose of reinforcing an emotional belief**

**"Gift that pays you back"**  
**"As simple as filling out a form"**

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### 3. Simple, Easy-to-Remember Content Resonates

- Stuck with a simple message from the beginning: #MAGA.
- Simplicity in speaking and tweeting in short bursts of easy-to-read text.
- No details but general statements.
- Website limited text above the fold. Clear calls to action line the top of the site, which means users don't have to search for what they're looking for.

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### 3. Don't Overwhelm....

- Simplicity may seem unlikely for a presidential campaign, but his simple direct content had a better chance of reaching his target audience.
- ✓ **Your messaging should provide a real solution for donors.**
- ✓ **Don't lose them in the noise of describing how it works.**
- ✓ **Focus instead on a simple narrative that's easy to understand.**

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### 4. Authenticity & Confidence Resonates

- In marketing, it is tremendously important to be authentic.
- Trump's authenticity stands behind the fact that he, at all times, had the courage to defend his radical measures, which he truly believes are necessary.
- No apologizing. Love him or hate him, he is a real person.
- ✓ **Is your marketing personal?**

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### 4. Be a Human...

Please contact us anytime!

Name

Phone

Contact our Office of Planned Giving for information on gift strategies that can help you support Fernley School of Psychology and provide significant benefits to you and your family. We are here to help you right and day.

**Dr. Edwin Price**  
 (555) 555-5555  
[gp@planning@fernley.sdsu.edu](mailto:gp@planning@fernley.sdsu.edu)  
 Vice President for Advancement,  
 Fernley School of Psychology

Send Us a Message

Name \*

Preferred Telephone Number

Home  
 Office  
 Cell

Email Address

Questions and/or Comments \*

Required

Submit

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### 4. Confidence is a Very Powerful Thing

- When Trump speaks, there is a great level of confidence behind his every word. No matter what statement he makes.
- It is evident that he truly means what he says, making his audience believe him, and trust him.

- ✓ **Do your PGOs and MGOs have this confidence?**
- ✓ **Conviction in PG is a must. Training is the key.**
- ✓ **Create "brand ambassadors" who will spread your programs word and ideas. (Legacy Society)**

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### 5. Know Your Audience

- #MAGA struck a chord with millions.
- The target audience they loved it (and bought the hat)!
- He was NOT trying to expand his "market," but to focus only on his voters and their pain points.
- Some found it extremely offensive... but it was not for them.
- The target audience loved it.

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**5. Send a Message the Audience Will Understand...**

- You can't appeal to everyone.
- ✓ **Target your messaging.**
- ✓ **If everyone is your potential donor, no one becomes your donor. Be very specific about who you are marketing to.**
- ✓ **Don't worry about excluding a majority of your donors. Instead, resonate deeply with your ideal donor.**
- ✓ **Make them feel like you're speaking directly to them.**

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**5. He Knew the Pain Points...**

- His voters see him as empathetic.
- ✓ **When you can tell your audience what their problem is better than they can articulate it themselves, they'll be more ready to listen to your solution.**
- ✓ **People trust you and connect with you more when they feel like you understand what they're going through. That's empathy.**

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**6. Emotion Over Facts (Storytelling)**

- Humans are extremely susceptible to emotion.
- We base decisions on our emotions first and logic second.
- Primal: fear, anger, disgust, sadness, and happiness.
- Trump is not a policy wonk. He's a storyteller pushing peoples emotional buttons.
- Elicits fear, anger and disgust and then provides a narrative to fit those emotions in.

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**6. We Know This Already...**

In Planned Giving we sell...

- ✓ **Your mission**
- ✓ **The impact of the gift**
- ✓ **The satisfaction of giving**

**These benefits are more powerful than tax benefits.**

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**6. Fear and Greed**

*"There are three great forces in the world: stupidity, fear and greed."*

*~Albert Einstein*

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**6. Fear Has Always Been a Marketing Tool**

- Politicians sell themselves to voters by using scare tactics
- Cable news stations use fear to sell their programs
- Advocacy groups do the same to sell memberships
- Realtors use it to sell homes in gated communities

When frightened, we react viscerally and want to take action to protect ourselves and our communities.

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**Happiness Makes Us Want to Share**

**1. Happiness/Joy:**  
 Our first emotional action in life is to respond to our mother's smile with a smile of our own. Joy and happiness are hard-wired into all of us. Joy increases when it is shared.

- ✓ **Nothing better than the self-satisfaction of giving.**
- ✓ **Giving contributes to an energy exchange that amplifies our own pleasure – it's something we're hardwired to do.**

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WHAT TO GIVE

starkey

A LEGACY MADE SIMPLE

MEANING THE NEXT STEP

LET US REQUEST

BE THE CHANGE

LEGACIES DESIGNATIONS

GETTY OF RETIREMENT ASSETS

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**I Want To Be the Select Few**

**2. Prestige/Belonging:**  
 Everyone wants to be included and to feel they are part of something larger than themselves. Make it easy for the donor to start a relationship with you. (Email, Mail or Event)

- ✓ **Do you have a Legacy Society?**
- ✓ **Or other exclusive donor groups?**

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**I WANT TO CHANGE LIVES, TOO.**

Yes, I'm interested in learning more about how to make a charitable gift to my school.  
 Yes, I have included a charitable gift to Wheeler in my will or estate plan.

Name and Class Year: \_\_\_\_\_  
 Preferred Phone: \_\_\_\_\_ Best time to call: \_\_\_\_\_  
 Email: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City/State: \_\_\_\_\_ Zip: \_\_\_\_\_

**THE SPIRIT OF GIVING THAT LIVES FOREVER**

**WITH A FUTURE GIFT TO WHEELER, YOURS CAN TOO!**

Help our friendships, teachers, coaches, or family members with a gift to Wheeler's endowment in your will or estate plan.

"Many of my close friends are Wheeler alumni—and their motto is that education can't be put on hold. Wheeler was important to me... I fully intend if my Wheeler friend passed away and they wished for me to plan for how my money will be allocated when I am no longer here."  
 —Cynthia Quares W.

"I cherish the tradition of giving to education from across my personal and family's generations, allowing for education after I am gone. Education is the one thing that can make us better every day."  
 —Dr. Marko Carter '74

Support a program that taught Mr. Lewis and helped give us our own path.

"I intend to be a life-long supporter of Wheeler. The certainty you provide as my source in college and into high school is a big part of the formation years where you give me your real, I mean support the kind of environment that really got me on my path."  
 —Kurt Elmer '63

"It's hard to remember at the end of your life, those who are important to you and to those other experiences that made you thankful for the world. In the end of the day it is not what you have accumulated in the world, but what a difference you can make."  
 —Joe and Helene Lewis

Remember a place on campus like the Forum, that holds special meaning for you or your family. The Segre Family is doing just that and had this to say about their former support:

"This first year your gift has to be something large or impressive. Small gifts made by many people over time have been the way of many of the remarkable qualities we see in the Wheeler families."  
 —Jim Baumgardner '62

Make an investment that truly changes lives. Like a gift to a scholarship endowment. A gift in 1996 of \$10,000, a now a work, approximately \$62,000 providing an annual award of about \$1,000.

"There are greater investments, where you can or not profit. Education is the most potent gift. In my mind you are the greatest value for your money when you invest in education."  
 —Dr. Charles Lewis '66

**WHEELER SCHOOLS**

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**Uplifting Emotion**

**3. Hope/Altruism:**  
 If creating a vision of a better tomorrow resonates with your donor community, then triggering the emotion of hope is something you should integrate.

- ✓ Giving more than they thought possible.
- ✓ Be the change they want to see

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**Tell Me More**

I would like information about:  
 How to donate to Partners  
 How I can help Partners  
 How I can help Partners  
 I have already contacted Partners  
 I have already contacted Partners

Name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City/State: \_\_\_\_\_ Zip: \_\_\_\_\_

**Partners in Health**  
 Together, we can prevent suffering

**A gift that pays you back.**

"When you create an immediate cash account or 529 college savings account for health, you receive a 50% tax credit on the amount of your contribution, up to \$1,000 per year." —Partners in Health

**How much will I receive?**

Partners in Health will help provide medical care to those of the poorest and most remote communities of the world. We have more about charitable gift accounts please go to: [http://partnersinhealth.org](#)

Partners in Health  
 1660 17th St, NW  
 Washington, DC 20036  
 Phone: 202-332-2112  
 Email: [info@partnersinhealth.org](mailto:info@partnersinhealth.org)

**BUSINESS REPLY MAIL**  
 MAILING LABEL  
 POSTBOX # 37129-046

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**Without You We Can't Help...**

**4. Fear/Guilt:**  
 You can play on this emotion to get the donor to believe they have a chance to right a wrong or improve something. (Or something may go terribly wrong if they don't act.) By getting them to feel responsible for a wrong, whether real or imagined, you can get the donor to act.

✓ **This is all fundraising, right?**

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YES, I WANT TO MAKE A DIFFERENCE!

NO ONE SHOULD CALL THIS A HOME

**HELP END HOMELESSNESS BY GIVING WISELY**

**A Home and Community for Everyone**

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**Sorrow Helps Us Connect and Empathize**

**5. Sorrow/Suffering:**

- The emotions of sadness and sorrow light up many of the same regions of the brain as happiness (perhaps fitting if one looks at sadness as the other side of happiness).
- The hormones produced when sad that help us create understanding and empathy may also make us more generous and trusting.

✓ **Images of puppies and/or babies get me every time...**

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**Greed Is Good...**

**7. Vanity/Envy:**  
 It seems that everyone wants more of something. Appeal to the donor's desire for more power or influence.

- ✓ Flattery will get you their attention and possibly their gifts.
- ✓ Naming opportunities

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TELL ME MORE

South Texas College of Law Houston

WHAT IS YOUR LEGACY?

CREATE YOUR LEGACY WITH YOUR WILL

Your gift will change lives

A charitable gift from your estate is a favored method of giving that enables you to achieve your financial goals and benefit STCCH. However, no other planned gift is as simple to implement as one we charge should you ever need the services of our attorneys.

Plan Carefully Making STCCH Beneficiary

When you name STCCH Houston as a primary beneficiary of your will, whether your plan, you make your gift to a charity and provide a gift STCCH. However, you cannot name it as the beneficiary.

Special Considerations

The following is intended to help you and your attorney in drafting a bequest that enables your individual bequest. As you consult your attorney on the selection of appropriate wording for your will, you may wish to consult with STCCH Houston, for more information on how to best name STCCH in all final documents.

South Texas College of Law Houston is a non-profit corporation, 501(c)(3) organization, and a charitable organization.

Already have a will? Plan carefully naming STCCH Houston as a beneficiary in your will.

Special considerations and donor agreements are available at 713-646-1111 or [www.stcchouston.org](http://www.stcchouston.org).

South Texas College of Law Houston is a non-profit corporation, 501(c)(3) organization, and a charitable organization.

Your greatest help is to make sure that you clearly express to your attorney that you want to give your gift to STCCH Houston.

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**Trust In You**

**8. Humanity/Conviction:**

- Donors feel they can depend on you – that you mean what you say and you'll do what you say.
- You have the know-how, competence, and expertise.
- They feel you have their interests at heart and that you'll take care of them throughout the transaction, and beyond.

✓ Building relationships is what we do.

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**Tell me more**

I would like information about:

Receiving income for life

I can include the Human Development Foundation in my estate plan.

Name \_\_\_\_\_

Address \_\_\_\_\_

City/State ZIP \_\_\_\_\_

Phone \_\_\_\_\_

E-mail \_\_\_\_\_

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**Create an estate plan that brightens the future**

Have you established your will or an estate plan?

Planning now will enable you to provide for the people and organizations that matter to you.

Including The Human Development Foundation as a beneficiary of your will or estate plan is simple. You can specify any dollar amount, give specific property or shares a percentage of your estate.

If you designate 10% or more of an estate, you will help us to support essential educational, economic and health care needs of children and young adults in need. It is a great opportunity to pass forward everything that The Human Development Foundation has invested in you.

**The Founder's Legacy Society**

The Founder's Legacy Society embraces the commitment of donors who have provided for a gift in their estate plan to ensure the future of the Human Development Foundation. Members are included in our annual communications for positive social change and community empowerment.

The Heritage of our Founder's Legacy Society members will provide the resources needed for years into the future to continue the fight against extreme poverty and the impact and dignity of every individual.

HDF has already identified our own initial priorities. You are invited to include HDF for a gift that your estate can help us reach a group of the most vulnerable, committed to reducing human rights and improving the quality of life of those in Pakistan.

**FOR MORE INFORMATION VISIT**  
[www.hdf.org](http://www.hdf.org)  
 OR CONTACT US AT  
 1-800-452-2222  
 #HDFLEGACY

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**What We Learned From 45?**

1. Throw rules out of the window
2. Consistency and repetition is key
3. Simple, easy-to-remember content resonates
4. Authenticity and confidence resonates
5. Know your audience
6. Emotion over facts (storytelling)

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**Questions?**

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**Still Have a Question?**

Contact: Andrew Palmer  
Email: [apalmer@pgcalc.com](mailto:apalmer@pgcalc.com)  
Phone: 888-497-4970

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