



# The Three Pillars of a Strong Marketing Program



Date: January 23, 2014  
Time: 1:00 – 2:30 Eastern Time  
Presenter: Gary Pforzheimer  
President





# Agenda

1. Timely Identification of Bequest Donors
2. Engagement with and Stewardship of those Donors
3. Proactive Bequest Administration



# Mantra for a Strong Bequest Program



**Find  
Donors**

**Treat  
Them  
Well**

**Get What  
You Deserve**

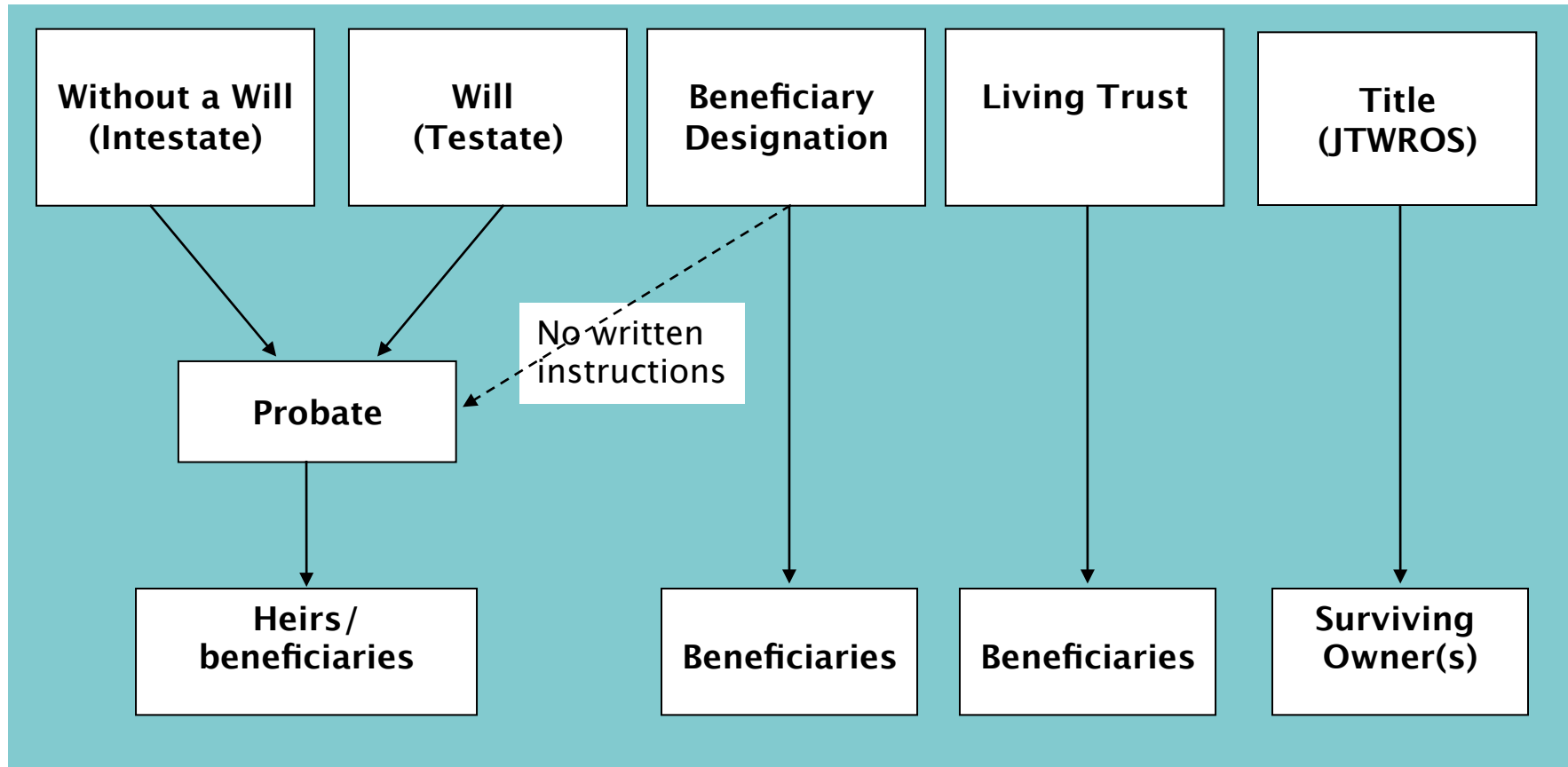


## Why is Bequest Fundraising so Important?

- Because such a high percentage of gifts from individuals are in this form
- Sometimes it's the most a donor can give
- Every charity can do it!




# Types of Bequests





# Effective Identification of Bequest Donors

- 
1. Increasing Awareness
  2. Identification and Cultivation
  3. Securing the Bequests



## Effective Identification of Bequest Donors: Increasing Awareness

- Get the word out (mission first)
- Target your efforts, but be broad
- Organizational contact should be well known



## Effective Identification of Bequest Donors: Identification and Cultivation

- Suspects to Prospects through the funnel
- Targeted promotion
- Website geared to conversions
- Use Board members
- Internal data mining
- Internal referrals





## Effective Identification of Bequest Donors: Securing the Bequests

- Your Board
- Targeted solicitations
- Your website and other collateral

### The BETA Society — Member Profile

Please fill out the form below to send us your member profile to be welcomed into the BETA Society.

**Please note:** All highlighted and starred (\*) fields are required.

Name(s): *	<input type="text" value="Required"/>
Date of Birth:	<input type="text"/>
Date of Birth (Spouse):	<input type="text"/>
Address: *	<input type="text" value="Required"/>
City/State/Zip: *	<input type="text" value="Required"/>
Telephone:	<input type="text"/>
E-Mail:	<input type="text"/>

**Please check one:**

- JDRF may include my (and, if applicable, my spouse's) name in the BETA Society listings. (Neither amount nor designation, if provided, will be included on the listing.)
- I am honored to be included in the BETA Society; however I prefer to remain anonymous. Please do not include my/our name in the BETA Society listings.

**Please tell us, in confidence, more about your estate provision for the Juvenile Diabetes Research Foundation.**

**I have named the Juvenile Diabetes Research Foundation as a beneficiary of my:**

- Will/Trust
- IRA or Retirement Plan
- Life Insurance Policy
- Charitable Trust
- Donor Advised Fund

Other (please specify):



# Meaningful Engagement with and Stewardship of Known Donors

1. Personal outreach & stewardship
2. Legacy Societies and group activities
3. External benefits



## Engagement and Stewardship: Personal Stewardship

- Thank early and often
- Ensure proper documentation
- Manage donor expectations, aspirations
- Develop personalized stewardship program
- Discuss possible group involvement



## Engagement and Stewardship: Legacy Societies & group activities

- “Membership has its privileges”
- Meaningful benefits
- Recognition of donors
- Events
- Group and personal



The Make-A-Wish  
Alaska and Washington  
welcomes


**JOHN SMITH**

to the Legacy of Wishes<sup>SM</sup> Society.  
Thank you for making a special gift  
and becoming part of the  
Make-A-Wish<sup>®</sup> family.

**LEGACY of WISHES<sup>SM</sup>**

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Barry McConnell  
President and Chief Executive Officer  
Make-A-Wish Alaska and Washington

A close-up photograph of a young child, Riley, who is 3 years old and has leukemia. The child is smiling broadly, showing their teeth. They are wearing a blue lace-trimmed garment. In the background, there are yellow flowers and a blue patterned object.

Riley, 3  
Leukemia  
I wish to be a fairy

Photo:  
Andria  
Deegan

# Mass General Hospital



THE PHILLIPS SOCIETY

## THE Phillips Society

WINTER UPDATE 2011



### **A Lasting Legacy of Giving**

*The Phillips Society honors  
the generosity of visionary  
individuals who support the  
mission of Massachusetts  
General Hospital through  
planned gifts.*



*The Isbister Legacy Society Luncheon is an opportunity for the U of M to thank its legacy donors in person.*

## The Isbister Legacy Society

The Isbister Legacy Society was established in 1999 and represents hundreds of living and deceased individuals who have made a gift in their will or have established another type of legacy gift benefiting the University of Manitoba. The society allows the university to recognize individuals for their thoughtful gifts and to celebrate the successes of the University of Manitoba with them.

Too often the university has become aware of these special gifts only after the benefactor has passed away. At these times, proper gratitude cannot be expressed personally. Through the Isbister Legacy Society, the university can show its appreciation.



**This society is named after our first benefactor, Alexander Kennedy Isbister, in honour of his vision for the university.**

*Isbister  
Legacy  
Society*





## Engagement and Stewardship: External Benefits

- Foster good will among family members and heirs of the donor
- Impress advisors
- Testimonials travel far



# Proactive Bequest Administration

1. Communication
2. Stay abreast of estate administration details
3. Recordkeeping and measurement



## Proactive Bequest Administration: Communication

- Have an internal point person!
- Have a tracking system
- Say “thank you” a lot



# Proactive Bequest Administration: Communication

Confirm that you can carry out decedent's wishes.	<b>Immediately</b>	<b>Yes</b>	<b>Yes</b>
Establish contact with the Executor and thank friends and relatives.	<b>Immediately</b>	<b>Yes</b>	<b>Yes</b>
Ask for copy of inventory	Three month milestone	Yes	Yes
Ask when anticipated distribution may occur. In theory, a residuary distribution could now be made, provided the estate is solvent. (Keep in mind that there may still	Six month milestone (or shortly after creditor claim and will contest period		<b>Yes</b>



## Proactive Bequest Administration: Estate Administration Details

- Have resources to help
- All bequests are not alike
- Play nice, but get what you deserve



## Proactive Bequest Administration: Recordkeeping and Measurement

- Be organized!
- Know your statistics
- Determine your target donors and recalibrate as needed
- Calculate your pipeline and cashflow



# Proactive Bequest Administration: Recordkeeping and Measurement

**Estate Profile**  
**Richard Starkey (Deceased) and spouse Barbara Starkey (Deceased)**  
 Charity: Auburn Historical Society (AUBURN)

<p><b>Donor :</b> Mr. Richard Starkey (DOB 07/07/1940, DOD 10/01/2012)                  100 Mulholland Drive                  Los Angeles, CA 987622</p> <p>Phone: 919-773-1288                  SS Num: 748-30-9843</p>	<p><b>Spouse:</b> Mrs. Barbara Starkey (DOB 04/29/1942, DOD 10/01/2012)                  100 Mulholland Drive                  Los Angeles, CA 987622</p> <p>Phone: 919-773-1288                  SS Num: 664-47-7336</p>
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**Legacy Society Memberships:** The Auburn Legacy Society,

*There is 1 bequest gifts with a total estimated distribution of \$250,000.00*

**Gift Key 3 -- Bequest Status: Partial Distribution**

Gift Date	07/08/2009	Gift Amount:	\$250,000.00	Account 1:	
Transfer Type:	Ben Desig	Gift Probability %:	100%	Account 2:	
Restriction Type:	Pecuniary	Amount times %	[\$250,000.00]	Account 3:	
Percentage of Estate:	0%	Notification Date:	10/16/2012	Account 4:	
Bequest Asset:	Retirement Asset	Confidence Level:	Very Likely	Account 5:	
Asset Description:	2 separate retirement accounts			Anonymous:	No
Date of Notice of Estate Filing:	10/25/2012	Bequest Known in Advance:	No		
Estimated Close Date:	12/31/2012	Bequest Rejected:	No		
Account Closed Date:					

Gift Name : Starkey Bequest - to benefit Historical Preservation

Distribution Date	Amount	Description
10/29/2012	\$148,000.00	Account ending in 4567
Total Distributions:		\$148,000.00



# Proactive Bequest Administration: Recordkeeping and Measurement

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## Contact Description

Received partial distribution. Expecting final distribution before end of year.  
Bequest Status changed from In Process to Partial Distribution For Gift Key 3  
Sent letter "Attorney\_Confirmation" to Beverly Sternberg  
Bequest Status changed from Notification to In Process For Gift Key 3  
Bequest Status changed from Intention to Notification For Gift Key 3  
Saw Barbara and Richard at Spring fundraiser.

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itor)

Mrs. Beverly Sternberg  
Sternberg, Sternberg and Dobbs  
2452 Michigan Avenue  
Suite 4500  
Chicago, IL 92713

Phone: 657-869-3900

Fax:

Email: [Sternbergb@SSD.com](mailto:Sternbergb@SSD.com)

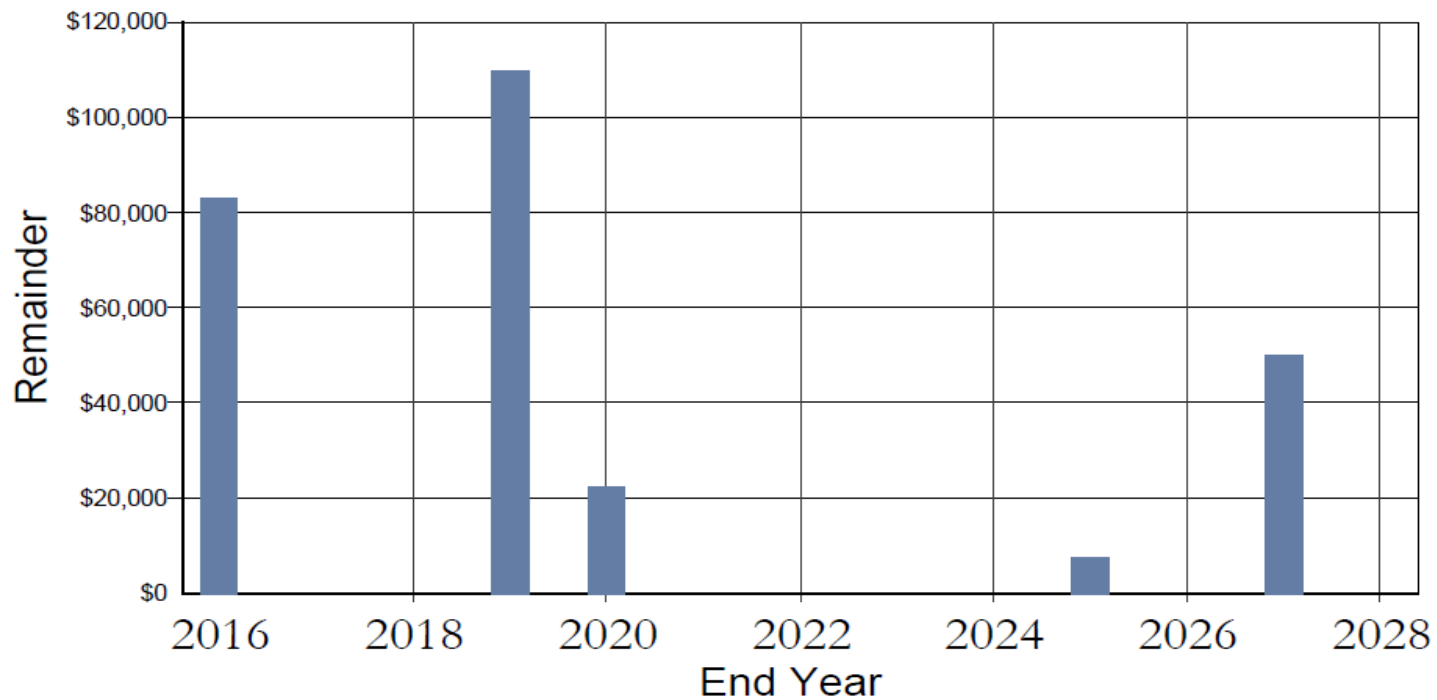
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# Proactive Bequest Administration: Recordkeeping and Measurement

Projected Remainder Amounts by Year as of 12/03/2012 based on the 2000CM Table





# Conclusion



**Find  
Donors**

**Treat  
Them  
Well**

**Get What  
You Deserve**



# Still Have a Question?

**Contact:** Gary Pforzheimer, President  
PG Calc

**E-mail:** [gary@pgcalc.com](mailto:gary@pgcalc.com)  
**888-497-4970**