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The Three Pillars of a Strong Marketing Program



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



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Agenda

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

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Mantra for a Strong Bequest Program



Find Donors Treat Them Well Get What You Deserve

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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!

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Types of Bequests

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graph TD
    A[Without a Will (Intestate)] --> B[Probate]
    C[Will (Testate)] --> B
    D[Beneficiary Designation] -.->|No-written instructions| B
    E[Living Trust] --> F[Beneficiaries]
    G[Title (JTWROS)] --> H[Surviving Owner(s)]
    B --> I[Heirs/beneficiaries]
    D --> J[Beneficiaries]
  
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Effective Identification of Bequest Donors

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


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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


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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

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Effective Identification of Bequest Donors: Securing the Bequests

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

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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): *

Date of Birth:

Date of Birth (Spouse):

Address: *

City/State/Zip: *

Telephone:

E-Mail:

Please check one:

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 listing.

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):

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Meaningful Engagement with and Stewardship of Known Donors

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

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Engagement and Stewardship: Personal Stewardship

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


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Engagement and Stewardship: Legacy Societies & group activities

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

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MAKE-A-WISH.
The Make-A-Wish Alaska and Washington welcomes
JOHN SMITH
to the Legacy of Wishes™ Society. Thank you for making a special gift and becoming part of the Make-A-Wish™ family.
LEGACY of WISHES™

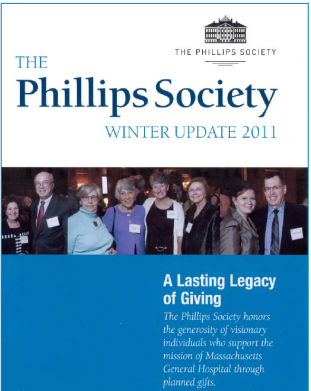
Betsy McConnell
President and Chief Executive Officer,
Make-A-Wish Alaska and Washington

Riley, 3
Leukemia
I wish to be a fairy

Photo: Getty

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Mass General Hospital



**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.

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


The *Ibister Legacy Society*

The *Ibister Legacy Society* was established in 1999 and supports 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 success of the University of Manitoba with them.

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

The only time 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 *Ibister Legacy Society*, the university can show its appreciation.


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Engagement and Stewardship: External Benefits

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


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Proactive Bequest Administration

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


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Proactive Bequest Administration: Communication

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


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Proactive Bequest Administration: Communication

Confirm that you can carry out decedent's wishes.	Immediately	Yes	Yes
Establish contact with the Executor and thank friends and relatives.	Immediately	Yes	Yes
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		Yes

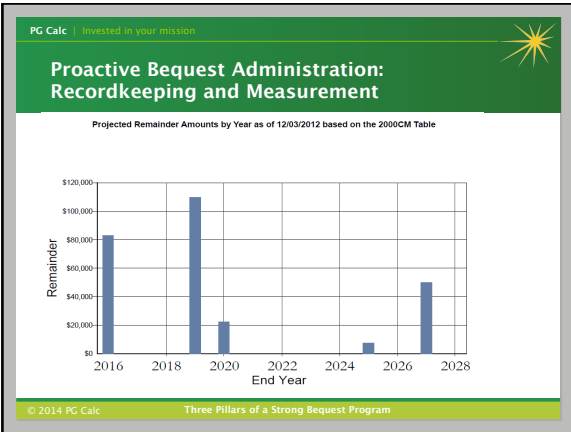
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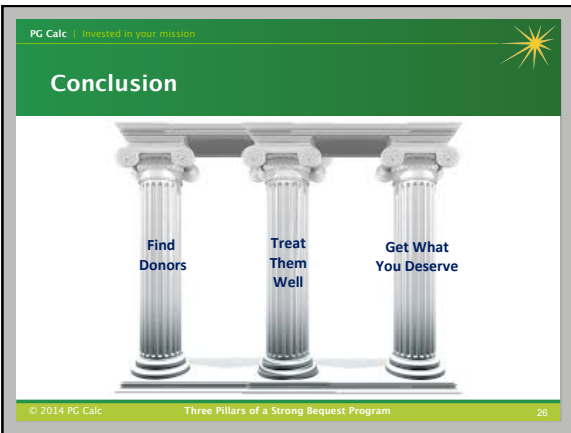
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Proactive Bequest Administration: Estate Administration Details

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

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Still Have a Question?

Contact: Gary Pforzheimer, President
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