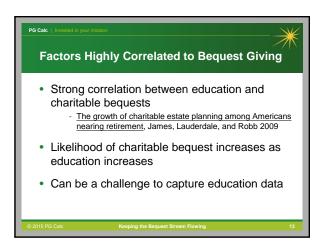
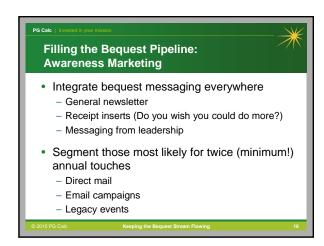


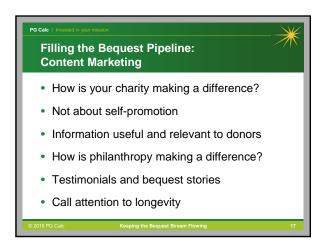
Factors Highly Correlated to Bequest Giving Presence or absence of heirs Charitable giving is a social act Charity acts as surrogate family Other factors being equal, childless most likely to engage in charitable estate giving Are you capturing childlessness in your database?



Factors Highly Correlated to Bequest Giving
Life events trigger will making
Children, grandchildren
Retirement
• Milestone age (60, 70, 80?)
Medical diagnosis
Move to retirement community
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Filling the Bequest Pipeline: Awareness Marketing • Why should donor support you? • Integrate legacy giving message in all channels • Segment? Yes Silo? No • Make it easy for prospects to raise their hands – Bequest language – Contact information – Easy to find





Filling the Bequest Pipeline: Social Norming • Giving is a social act • Perception (correctly as it happens) is that estate giving is rare • "Many of our supporters like you..." • Consider the target demographic • Use "family" words not "formal" words

