



Engaged
Generosity

TIPS FOR ENHANCING YOUR PLANNED GIVING PROGRAM

THE CHALLENGE

A comprehensive planned giving program requires consistent and constant implementation of identification, cultivation, solicitation and stewardship.

THE APPROACH

The seven field-tested tips in this paper are organized around those four activities, in the hope that one or more might prove useful.

Simply, remember to:

- Identify
- Cultivate
- Solicit
- Steward

THE PAYOFF

When each of the four activities gets steady attention, prospects are easier to find, donors feel connected to your mission, and more of them choose to leave a lasting legacy.

Start with the tips that fit your organization and build from there.

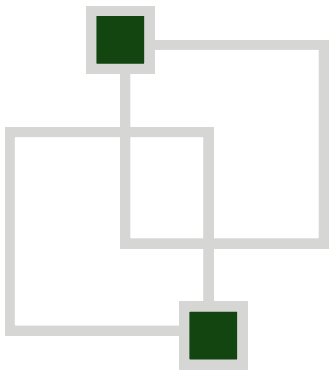
1

ADD CHECKBOXES

- Online Giving Page: Add optional checkboxes so donors can raise their hand for planned giving.
- Sample Options: See the example checkboxes at the bottom of this page.

2

MINE YOUR DATA



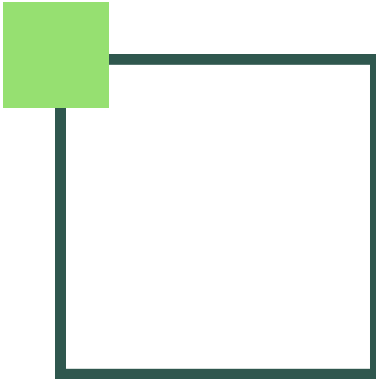
- Donor Profile: Look for recent and consistent donors (consecutive years of giving at any level), especially single women 60 or older.
- Analysis and Survey: A 10-factor regression analysis rank-orders your database, and a donor survey on interests, mission, programs and use of assets surfaces more prospects. Engaged Generosity can provide both on request.

SAMPLE CHECKBOXES

- ☐ I would like to learn more about making a planned gift
- ☐ Making a planned gift is on my to-do list
- ☐ I have already included [Organization] in my estate plans

3

BUILD A COMMS PLAN



- Planned Giving Only: Email blasts, texts and direct mail focused exclusively on planned giving topics.
- Content Ideas: Profiles of planned giving donors and estate-planning webinars.

4

TALK ABOUT LEGACY

- Don't Talk About Death: Talk about creating a lasting legacy, making a difference for future generations or honoring someone.
- Add a Tagline: On letterhead, your website, email signatures and social media: "Please remember [Organization] in your estate plans. For information on how to do so, please contact [Name, Phone]."

JANUARY

Planned giving outreach

APRIL

Planned giving outreach

JULY

Planned giving outreach

OCTOBER

Planned giving outreach

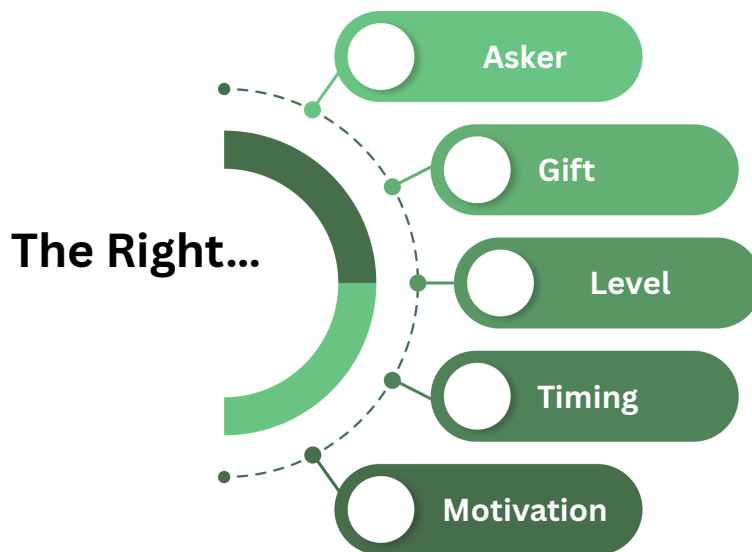
TIMING

Keep clear of annual
fund appeals

5

CREATE A MOVES PLAN

- Personalize Every Interaction: Build a moves management plan for each prospect, starting with the most promising.
- Answer Four Questions: Who is the right person to ask? What kind of gift? What level (at least 4–5 times their largest gift)? When is the right time?



6

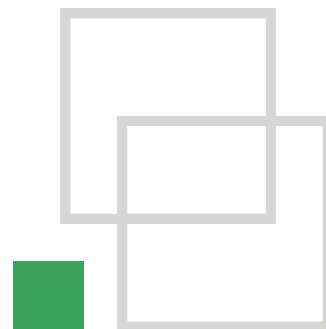
LISTEN FIRST

- Employ the Art of Listening: Give prospects room to share what matters to them.
- Ask Good Questions: Learn what motivates the prospect, then shape the gift conversation around it.

7

THANK & RECOGNIZE

- Thank Often: Thank planned giving donors at least twice, and up to six times, a year (Jerold Panas).
- Name a Society: Name it for your first or largest planned giving donor, a prominent person or an important date, and invite prospects to join.



KEEP STEWARDING

List planned giving donors in their own section of published donor lists, hold an annual recognition event, and survey them on how well your organization is delivering on its mission and programs.

And remember:

- Identify
- Cultivate
- Solicit
- Steward

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Advisers in Philanthropy