There Is Money Out There.
Here’s How To Get It.

Practical
Compelling
Funny
Passionate
Controversial
Painfully Honest

“Planned giving is a people business. If you love people, you will raise more money than you ever imagined.”

Viken Mikaelian
Founder & CEO, PlannedGiving.Com
Audience, Objectives & Technical Requirements

Presenter: Viken Mikaelian
Title: There Is Money Out There: Here’s How to Get It.
Presentation Format: Breakout / How-to Session / Keynote
Session Experience Levels: Foundational learning. No experience required. Open to all fundraisers.
Number of Presenters: One
Presentation History: Previously presented (please see pages 6 and 7)
Presenter’s Experience: Extensive (please see pages 6 and 7)
Overview: Please see pages 2 and 3
Requirements: Wireless Microphone
Power Point Projector
Screen
Internet Connection (wired or wireless)
a plus (but not required)

An audience that’s ready to learn, laugh, and be inspired

In the fundraising world, there are lots of planned giving seminars. And, all of them present the same information in the same way—dry, boring statistics on ways to get money from people who are dead. Viken brings a refreshing and spirited approach to planned giving that everyone can relate to. With simple illustrations and humor, attendees left with a sense of purpose and a very practical approach to starting, managing or refreshing a planned giving program.

Tim Connor
Grace Community School
Tyler, TX

See page 4 for more testimonials.

Viken Mikaelian speaks on many topics, but this presentation is the most popular. Participants leave invigorated and armed with practical ideas they can use today to close more and larger gifts.

What’s it about?
It’s easy and oh-so profitable to go after “gifts anyone can make.” Here’s how...

Who’s it for?
Considering that the typical planned gift is 200-300 times a donor’s largest annual gift, all fundraisers, including well-seasoned gift planners, have a lot to gain from this presentation. There’s something here for everyone.

What’s the point?
By the end of this session, attendees will have learned:
1. How to borrow tricks and techniques from for-profit businesses to close more and larger gifts.
2. How to avoid killer mistakes that alienate prospects and squander budgets.
3. Solid marketing principles: What works and what doesn’t when it comes to promoting planned gifts.
Viken is a walking, talking Wikipedia of planned giving knowledge and experience. Thankfully, he also has a sense of humor, which means he delivers it all in a lively, engaging manner. This presentation is full of practical ideas to help your members invigorate their fundraising efforts. Starting immediately. Here are some highlights:

✓ Four no-hassle planned gifts anyone can make that you could be closing now, stress-free, without a lawyer.
✓ Cash giving is reactive; planned giving is pro-active. The difference matters.
✓ Educate your prospects and they will give.
✓ Let’s get selfish: Why planned giving is good for your career.
✓ Stop promoting death. Promote immortality.
✓ Sell the sizzle, not the steak.
✓ Don’t make your prospects think.
✓ No one reads your traditional planned giving newsletter (except you).
✓ Planned giving and social media: not the best use of your time.
✓ U.S. Mail beats e-marketing by a long shot. Here’s what and when to send.
✓ You don’t have to be edgy (though I recommend trying it once in a while), but you can be spirited. Make a person laugh and you’ve got their attention.
✓ Planned giving is not fundraising. It’s marketing. And sales.
✓ Stop hiding behind your desk. Go visit a donor. They are lonely and waiting.
✓ No one Googles Unitrusts first thing in the morning. Ditch the jargon.
✓ American Express, Ferrari, and Rolex. Something they share in common.
✓ How to select your best prospects.
✓ Gift plans your wealthiest donors pay top dollar to discuss with advisors.
✓ If you send a mailing of 10,000 and receive no complaints, you have a problem.
✓ Overcome the tyranny of the urgent. (So you can attend to the important.)
✓ The secret sauce of the most successful planned giving programs.
✓ The best marketing tools for your team: Examples, examples, examples!
✓ Why a planned giving website is useless. Unless...
✓ Be donor-centric. Make the donor the hero of your story.
✓ If you’re not marketing planned gifts to your prospects, the other nonprofit is. They’ll eventually get your cash gifts, too.

New technology, same old people. Prospects have not changed, but their attention span has. With all the hype and marketing noise in the media (up to 3,700 messages per day, per person), it is becoming increasingly difficult to get your story through.
Planned Giving:

It’s about

Relationships.

Loyalty.

Conversation.

Trust.

(And a splash of humor never hurts.)

Get ready to raise more money than you ever imagined.

“The entertainment industry has Madonna, Sting, and Bono. Sports has Magic, Venus and Serena, Michael, Tiger. For those of us in planned giving, there’s Viken. He wants us to re-think the ways we reach out to the individuals who support our organizations. The language we use. Viken also brings a colorful and direct approach to talking to us about what we do right, what we do wrong (you’ll see he’s not afraid to show us what we do wrong) and how we can do better.”

Ron Fleury, Past President, Planned Giving Group of Connecticut

“Very pertinent and immediately useful info.”

“Controversial, funny, and painfully honest.”

Jeff Cory, Planned Giving Council of Lee County

“I have been in fund development for 30 years. This was not the same old same old.”

“After working in planned giving for almost 25 years, it is refreshing to encounter Viken’s approach to planned giving marketing.

You can’t help but laugh — and learn — once Viken takes the mic. His energy is contagious. Viken listens closely to questions from participants, so he is able to meet them where they are — whether they are new to the field or seasoned veterans.

His presentations are packed with down-to-earth and useful information you can use. Viken’s story-based style and inspirational presentation make planned giving marketing success very real.”

Mary B. Hopkins, (formerly) Delaware Community Foundation

“I find that I need a regular “dose” of Viken to remind me of what I need to be doing and keep me on track.”

“Thank you for making an enlightening presentation to the Board last night. After you left, the group had a very rich discussion and were very passionate and enthused about how to initiate a planned giving program using the simple and straightforward suggestions and ideas you shared. WOW! It was a great evening.”

Steven L. Wantz, Executive Director, Institutional Advancement and the College Foundation, Carroll Community College

More...
“Viken Mikaelian balances an in-depth knowledge of his subject matter with concrete examples and subtle humor. Our AFP audience of seasoned professionals praised both the information and his use of the live internet in this fast paced presentation. One out-of-towner made a point of saying, “It was well worth the drive!” We look forward to having Viken back again.”

Lucy O’Donnell, AFP of Delaware

“He was the best speaker on this topic that I have heard! Excellent presentation.”

“Viken can speak to a group in a darkened room at 1 p.m. after a high-carb lunch and have you sitting bolt upright in your chair with the synapses of your mind pingering with transmissions and on high alert. Using colorful stories and examples, he makes the case that planned giving is not fundraising, but marketing. Viken advises a simple, no-nonsense approach.”

Susan Fisher, (formerly) Univest Foundation

“So many good ideas, wonderful sense of humor.”

“Viken made technical stuff make sense to me. He was informative, entertaining and provided me with ideas that led to gifts. It doesn’t get any better than that.”

Jack Miller, Pittsburgh Planned Giving Council

“100% of attendees rated his knowledge at 5 out of 5. Overall performance 4.625.”

“Viken was a hit in Pittsburgh last week. Praise was high and so were the ratings. We measure Quality, Content, and Relevance. Viken’s were all in the 95% – 98% range and comments were strongly positive. After reviewing the Program Evaluations from his presentation, the fact that comments repeated used words such as “excellent,” “wonderful,” “outstanding,” “fantastic,” and “fabulous” speaks for itself. Thanks again for a great program.”

Gordon M. Core, President, Pittsburgh Planned Giving Council

“Very good session. Useful and funny!”

“Thank you for sharing your expertise with our AFP Chapter! You were wonderful. I overheard a woman say that it was the best presentation that she has attended — EVER. Music to my ears…”

Josie Burri, Wistar Institute
Past Presentations — partial list

National and Regional Conferences
CINCINNATI, OH
National Conference on Planned Giving

NASHVILLE, TN
National Conference on Planned Giving

GRAPEVINE, TX
National Conference on Planned Giving

GREENSBORO, NC
AFP NC-Triad Chapter

SAN FRANCISCO, CA
Northern California Planned Giving Council

DALLAS, TX
Christian Stewardship Association

SAN FRANCISCO, CA
Catholic Stewardship Conference

COSTA MESA, CA
Western Regional Planned Giving Conference

PORTLAND, OR
Northwest Planned Giving Roundtable Conference

SEATTLE, WA
Washington Planned Giving Council

AFP, PPP and Other Chapters*

BOSTON, MA
AFP Boston Chapter

FARMINGDALE, NY
Long Island Philanthropy Day

BALTIMORE, MD
Chesapeake PG Council

ZANESVILLE, OH
Hills of Ohio Planned Giving Council

PITTSBURGH, PA
Pittsburgh Planned Giving Council

WASHINGTON, DC
Council for Resource Development

CHATTANOOGA, TN
Greater Chattanooga Area Planned Giving Council

PHILADELPHIA, PA
Partnership for Philanthropic Planning of Greater Philadelphia

PROVIDENCE, RI
PPP of Rhode Island

HORSHAM, PA
AFP-Greater Philadelphia

BOCA RATON, FL
AFP – Planet Philanthropy

DEARBORN, MI
PG Roundtable of SE Michigan

NEW YORK, NY
Greater NY Planned Giving Council

Hendersonville, NC
SC Planned Giving Council at Kanuga

CHATTANOOGA, TN
Chattanooga Planned Giving Council

DALLAS, TX
Dallas Chapter of PPP

FORT MYERS, FL
PG Council of Lee County

NEWARK, DE
AFP Brandywine Chapter

PHILADELPHIA, PA
PGC of Greater Philadelphia

KNOXVILLE, TN
Smoky Mountain Planned Giving Council

LISLE, IL
Suburban Chicago Planned Giving Council

WALTHAM, MA
Planned Giving Group of CT

LANSDALE, PA
Univest Foundation

WASHINGTON, DC
National Capital Gift Planning Council

PARSIPPANY, NJ
AFP of New Jersey

PHILADELPHIA, PA
PG Council of Greater Philadelphia

HOUSTON, TX
Houston PG Council

SANTA FE, NM
Santa Fe Community Foundation

NEW ORLEANS, LA
Greater New Orleans Chapter of the AFP

BOSTON, MA
PG Group of New England

HENDERSONVILLE, NC
SCPGC Planned Giving Vacation at Kanuga

ISELIN, NJ
Gift Planning Council of NJ Conference

HARRISBURG, PA
AFP Central PA Chapter

ROCHESTER, NY
Planned Giving Council of Upstate New York

PHOENIX, AZ
Phoenix Chapter of AFP

BLOOMINGTON, MN
Minnesota Planned Giving Group

HOLLAND, MI
West Michigan Planned Giving Group

* Some councils/chapters are listed more than once due to repeat presentations.
Great speaker.

Fabulous – again.

Excellent.

... and over 320 others...
About Viken Mikaelian

Viken Mikaelian was the first to bring planned giving to the Internet back in 1999. Since then, his companies PlannedGiving.com and VirtualGiving.com have helped over 1,200 non-profits get their planned giving programs on the Web.

Many people make a living by complicating planned giving. Viken makes his by keeping it simple. He shoots straight, keeps things practical, and adds a welcome splash of flavor to otherwise vanilla topics.

Viken has presented at over 320 planned giving councils, AFP and AHP chapters, foundations, and banks, and five times at the Partnership for Philanthropic Planning (formerly the National Committee on Planned Giving). He publishes Planned Giving Tomorrow (circulation 14,400), a quarterly magazine with marketing ideas for fundraisers, and he has authored over 1,600 publications for capital campaigns and planned giving programs. His firms have received numerous awards, including five from the Council for Advancement and Support of Education (CASE). He regularly conducts surveys to keep on top of the pulse in the fundraising community.

But impressive portfolios are a dime a dozen in any industry. What really sets Viken apart is his unique ability to combine extensive knowledge of planned giving principles with common-sense marketing and smart technology—all for the end goal of presenting planned gifts to the lay prospect in a way that is compelling and easy to “get”.

Viken graduated from the University of Pennsylvania. He was a pre-med student and almost decided to become a doctor, but the planned giving community is glad he didn’t.
References

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