

ENGAGE DONORS

on Facebook



80

**Planned Giving
Social Media
Posts**



INTRODUCTION

HOW TO USE THIS CONTENT:

Planned giving is simple. But getting donors to think about naming your organization in their will takes time and cultivation. Demystifying some complexities is a critical but necessary part of the process. The first step is to get them thinking about planned giving and reminding them that your organization is willing, ready, and able to accept planned gifts. Invite them to consider naming your nonprofit in their will to open the door to begin a dialogue. Social media is a good way to extend your reach and engage. Not sure where to start? Ask us about our [Social Media Survival Guide!](#)

NEXT STEPS:

Below are 80 Facebook posts you can use, modifying them based on your organization, to ensure you stay top of mind as your donors and prospects determine both their charitable and financial plans. Of course, you should already be talking about planned giving. If you're not, the content provided can serve as an editorial calendar while you create some more personalized content. Or, simply sprinkle in the posts with your current social media plan. Publishing 2-3 of the pre-generated posts below per week can give you six to nine month's worth of planned giving content.

BONUS CREATIVE SUGGESTIONS:

- **Interview existing members of your legacy society to develop vignettes about their story.** Include his/her/their picture. Why did they commit to a planned gift? What are they hoping to accomplish through it? What made your organization as important as their heirs? There is a story to be uncovered and shared. Those individuals are your biggest resource development champions and organizational ambassadors. Thank them while they are here. Their story can be a selling point for someone who is either unaware about the benefits of planned giving or is currently on the fence.
- **For those who left a planned gift and have already passed, speak to what that gift has achieved:** outcomes, number of camp sponsorships, pounds of food purchased, growth of the endowment since its creation, etc. Neither the story nor the gift itself should die with the donor. Your responsibility is to ensure their legacy continues to live on, which is also a value add to your organization.
- **Consider interviewing people who have not committed either way.** You know who these people are. They have been long-term donors across various levels at your organization or have served as volunteers. Invite them for a focus group to gain their feedback or host a Lunch and Learn in person or virtually. Most don't give because they weren't asked. Some people wrongly assume there is a high level of sophistication needed for planned giving, and if they feel you aren't a large university, national charity, community foundation, or major hospital system, you can easily be overlooked.
- **New!** Use this link to help donors make out a will for free:
<https://gift.gs/will>

Your Success Team

Major Gifts LLC

succeed@majorgifts.com | 800.490.7090

1. A planned gift is a commitment made during your lifetime, often with no financial commitment today, that supports an organization like ours when you no longer need your assets.

2. If you have invested in our mission through regularly supporting our work, volunteering your time, or supporting our organization, please consider a planned gift.

3. One of the most important decisions to make after naming us in your estate plan is to notify us about your intention. We would like the opportunity to properly thank you during your lifetime.



4. There are major benefits to planned gifts – tax incentives, an optimized estate, and the ability to perpetuate your values are only a few. Contact us so we can tell you more and help you determine what giving vehicle best suits your financial situation.

5. A planned gift is a well-thought-out way to invest in our mission without jeopardizing your nest egg.

6. Did you know many planned gifts are revocable? We appreciate you thinking about naming us in your estate (and hope it stays that way!). But please know that if your financial picture changes during retirement or unforeseen circumstances arise later in life, you can still use the assets. It's your money—you determine where it goes.

7. Have you thought about how planned gifts fit into your overall financial plan? Please contact us to talk about your charitable ambitions. Planned gifts often cost you nothing during your lifetime and can protect your assets. Some gift vehicles can even pay you. Let us tell you more.

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8. By including us in your estate plan, you are creating a legacy that tells future generations what causes mattered to you. There are many ways to do it.

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9. One of the easiest and quickest ways to make a planned gift is by naming us as a beneficiary of a retirement account, investment account, savings or checking account, or insurance policy.

10. In many instances with planned gifts, an ordinary signature can make an extraordinary difference.

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11. More than half of all Americans do not have wills or estate plans. Don't leave it up to your loved ones to guess what to do with your assets when you no longer need them, especially if you have a special appreciation for an organization like ours.

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12. You worked hard to achieve what you have and you deserve the right to say what happens to it. A will gives you that control. When you write your will, we hope you will consider including a planned gift to us regardless of the amount. It's a simple and incredibly meaningful way to make a final investment in our mission.

13. If you have already named us in your estate plan, one of the most powerful ways you can support our organization is to tell people about your intention. Both come at no cost to you today and are immensely powerful actions that will benefit us over the long term.

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14. How would it feel knowing that you can be an incredible support to us without impacting your current lifestyle or your family's financial security? We would like to tell you a little more about planned gifts – how they are an advantaged way to support us, and how you would receive tax benefits from different giving vehicles.

15. They say the past already happened and the future isn't promised, so enjoy the present. That is why it is called a gift. We would kindly ask you to remember us when planning your estate, defining your legacy, and evaluating charitable interests.

17. You don't have to rewrite your will if you want to include a charitable gift. A simple document called a codicil is used to make amendments to an existing will. For example, you might use a codicil to change the executor of your will or to add a charitable gift.

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19. What are the benefits of giving to us through your will? Your assets remain in your control during your lifetime. You can modify your gift to address changes in your life. Under current tax law, there is no upper limit on the estate tax deduction for your charitable bequests.

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16. Your planned gift could change the world for someone you will never have the opportunity to meet.

18. The bequest is one of the most common planned gifts. You can make a planned gift to us via a bequest by simply naming us in your will—it's that easy!

20. Every single one of these statements is false: I'm too young to do estate planning. Estate planning is only for the super-rich. Estate planning is complicated and expensive. Doesn't the government provide for that? We did our wills 30 years ago and see no need for further planning.



21. Let's have a conversation if you are planning a gift through your will. Based on your situation, you may want to give a specific dollar amount, a property, appreciated securities, or prefer to bequeath a certain percentage of the remainder of the estate that remains after paying all debts, costs, and other prior legacies.

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22. A planned gift through a will or estate is a good choice for you if you want to help us ensure future viability and strength and you would prefer a commitment that doesn't affect your current cash flow. Please contact us if you are considering a bequest. We are here to help.

23. Writing a will can be one of the least expensive legal documents and is often a straightforward process. The peace of mind you gain by knowing you have a valid will in place is well-worth the attorney's fee.

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24. Estate plans often prompt some deep thinking from best-case to worst-case scenarios. A contingent bequest is a very flexible arrangement that directs a gift to us only if certain life events do not occur. Sample language can state something like: "If my spouse does not survive me, I bequeath the residue of my estate to XYZ Charity."

25. Did you know you can support organizations like ours through your retirement plan, IRA or 401(k)? By naming us as beneficiary, you can continue to make lifetime withdrawals and keep the flexibility to change beneficiaries if things change.

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26. Retirement plans are fantastic vehicles for planned giving. By designating us as beneficiary, your heirs avoid potential double taxation on the assets left in your retirement account. Please let us know if you decide to name us, since plan administrators are not obligated to do so.

27. A planned gift through a retirement plan is the most efficient distribution of assets from your estate. As a qualified nonprofit, we will receive the distribution tax-free, whereas taxes would be imposed when passing funds from your retirement account on to your heirs.

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28. Making a planned gift through your retirement plan is extremely straightforward. Simply contact your IRA or retirement plan administrator and request a copy of the change of beneficiary form. Quick, easy, and incredibly impactful!



29. Not all planned gifts are made by bequest or retirement beneficiary designation. Appreciated stock and securities are a major win-win. Transfer the stocks to us. We will be able to sell the securities at the full amount tax-free, and you will gain a tax deduction for the fair market value of your stock donation, plus pay no capital gains!

30. Thinking about supporting us with a gift of stock? Do not sell the securities first! Contact us first, because even though you intend to give the proceeds as a gift, the IRS will impose capital gains tax on your sale, wiping out the benefits of this transaction to you.

31. A gift of stock is a great option if you want to make a gift that doesn't affect your liquidity or cash flow. Contact us so we can talk about your unique financial situation and charitable ambitions.

32. Life insurance policies that are no longer needed to protect your family from the financial burden of your passing can be used to fund your charitable plans instead—just by designating us as a beneficiary!

33. What are the benefits of using life insurance for your planned gift? You're using an asset you and your family no longer need. Receive an income tax deduction equal to the cash surrender value of the policy.

34. Real estate is another planned giving vehicle, and a variety of techniques can make charitable gifts of real estate financially appealing. Real estate tends to be illiquid and presents other planning challenges that should be further discussed with your professional advisor.

35. Benefits of using real estate for a planned gift? You receive an income tax deduction for the fair market value of the real estate. You pay no capital gains tax on the transfer. You can direct the proceeds from your gift to a nonprofit like us.

36. As a real estate planned gift example, you can deed your home, vacation home, undeveloped property, or commercial building to us. You may continue to use the property rent-free—ownership passes to us when you no longer need it.

37. Your treasures like valuable antiques, stamp and coin collections, works of art, cars, boats, and other personal property can make suitable charitable gifts today or after your lifetime. Contact us to learn more.

38. If you are considering gifts of property, know that you receive an immediate income tax deduction for the appraised value of your gift and pay no capital gains tax, so long as the gift can be used by your favorite charity to carry out its mission.



39. In some cases, gifts of personal property can be transferred to a charitable remainder unitrust that will provide the donor with tax deduction benefits as well as setting up an income stream for beneficiaries such as a spouse, children, and/or other loved ones. Only personal property with a value of \$50,000 or greater should be considered for this purpose.

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40. Did you know your bank accounts can be made into planned gifts? Contact your bank to complete or update your POD (Pay on Death) form for your checking, savings accounts and jointly held accounts. A designated nonprofit can receive the remaining account balance after your passing.

41. Did you know that there are planned gifts that actually pay you income? The IRS allows and encourages these creative plans that can stretch your giving ability. They include charitable gift annuities, charitable remainder unitrusts, and charitable remainder annuity trusts.

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42. What makes planned gifts that provide income so great? An additional source of lifetime income for you, your spouse, or other significant persons; a potential increase in the income you are currently receiving from your investments; an immediate tax deduction for a portion of your gift; no capital gains tax due at the transfer of appreciated assets to your gift plan.

43. A charitable gift annuity is an irrevocable agreement, whereby you donate cash or stock now, gain immediate tax benefits, and receive a fixed and guaranteed income for life for you and/or a loved one.

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44. What can a charitable gift annuity do for you? Provide dependable cash-flow for life, regardless of fluctuations in the market. In many cases, receive payments at a rate higher than the interest you are currently receiving on investments. Receive an immediate income tax deduction for a portion of your gift. A portion of your annuity payment will be tax-free.



45. Rather than increasing income, you may be wondering how you will deal with highly appreciated property or a growing family business. There are planned gifts that help protect your assets as well as help you meet your personal goals, save on taxes, and make a gift at the same time.

46. What is a charitable bargain sale? You sell your residence or other property to a nonprofit like us for a price below the appraised market value—a transaction that is part charitable gift and part sale. The charity may use the property, but usually elects to sell it and use the proceeds of the sale for the gift purposes you specified.

47. How do you benefit from a charitable bargain sale used as a planned gift? You receive an immediate income tax deduction for the discount you took from the appraised market value of your property. And you pay no capital gains tax on the donated portion.

48. A retained life estate is a great planned gift arrangement that allows you to give your home to us, while retaining the right to live there for the rest of your life.

49. How does a retained life estate benefit you as a planned gift? You can give your home but retain the security of using it for the rest of your life. You receive an immediate income tax deduction for a portion of the appraised value of your property.

50. A charitable lead trust is one of the best tools for tax savings on passing intergenerational transfers of wealth to your heirs. This planned gift holds appreciating assets for a term of years (or for your lifetime), and makes quarterly or annual payments to us. At the end of the trust's term, all remaining trust assets are distributed to your designated beneficiaries with greatly reduced gift and estate tax, regardless of how much the trust has grown.

51. How do you benefit from a charitable lead trust? You contribute securities or other appreciated assets to a charitable lead trust. The trust makes annual payments to us for a period of time. When the trust terminates, the remaining principal is paid to your heirs.



56. Do you want to explore the opportunities and find the best way to honor a loved one with a special tribute gift? Let's talk. We can help you dream up your perfect legacy gift, and then we can collaborate with your advisors to make your dream a reality.

52. Estate plans are for anybody who cares about the continuation of their financial commitments even after they have departed this life.

53. Many individuals find that one of the most gratifying aspects of success is the ability to provide financial support to help transform charitable goals into impactful action. Contact us so we can discuss yours.

54. Professional advisors like your CPA, attorney, and financial planner can give you a better idea of how planned gifts fit into your financial picture. Invite us to the table and we can help determine your goals and charitable ambitions.

55. Want to be remembered? When there's a will, there's a way. Let's discuss the mark you want to leave on the world through a gift that costs you nothing during your lifetime.

57. Invest in our mission with flexibility and freedom. Your revocable planned gift won't affect your current cash flow and can be modified at any point if you change your mind or things change.

58. If you die without a will, the court will decide how to disburse your assets. Of course, the court isn't aware that you may have favorite family members, or that you wanted to remember a few of your favorite charities with a gift.

59. A life worth living often leads to a gift worth giving. A no-cost revocable decision during your lifetime can lead to endless impact.

60. We are seeking a few forward-looking friends that we can welcome to our organization's legacy society. Even if you wish to remain anonymous, our commitment is to help you leave a lasting statement about who you are and what you cared about most.

61. There are so many simple ways you can make a difference with no financial impact to you today. Through a planned gift you can help us do what we do today, even better tomorrow, and for generations to come.

62. You can make a big difference for our organization and gain a double tax benefit for yourself. Donate appreciated assets like stocks, bonds, or mutual fund shares.

63. Steps to becoming a legacy society member: 1) Plan your gift. 2) Tell us about your gift after you make it official. 3) Be remembered for making a difference with something you were passionate about.

64. Please consider leaving us behind ... in your will, that is! Your action, regardless of amount, will encourage others to make a difference in their own way. We would love the opportunity to tell you how simple it is to do just that.

65. When you open a bank account, set up a retirement plan, or take out an insurance policy, there is a form that lets you designate who will inherit the money in those accounts after you pass. That beneficiary designation form can keep your money out of probate, which means no attorneys, no hassle for your heirs, and no extra expenses tacked onto your estate. And, you can designate an organization like ours as a beneficiary, as well as individuals.

66. "Leave" by example. When you include an organization like ours in your estate plan, you leave behind a legacy that tells the world what mattered most to you.

67.No will? The government WILL decide what happens to your assets when you no longer need them. Be proactive. Be intentional. Be the difference by naming an organization like ours in your will.

68.Considering a planned gift? When you meet with your CPA, ask how it fits into your overall financial picture. There may be a solution that gives you both tax and charitable benefits.

69.If it's between Uncle Sam and us, where would you want your assets to go?

70.Three incredible benefits for naming us as beneficiary to a retirement account: 1) It is revocable if you need your assets. 2) It saves your heirs a substantial amount of taxes. 3) We can be named to receive a fixed amount, percentage, or remaining balance.

71.The most impactful gift builds a better tomorrow. A planned gift can do just that and cost you nothing during your lifetime. Ask us how.

72.Planned gifts can be simple or complex. They can cost you nothing during your lifetime, pay you income, or protect your assets. Let's start the conversation about how we can help you create a legacy.



73.Your planned gift is our promise to honor your intent. Whether a percentage or fixed amount, large or small, regardless of the gift type – we are here to help your charitable goal turn into a meaningful legacy that creates real impact.



74. If you're leaving us a planned gift, allow us to thank you in the present for the benefits your gift will carry into the future.

75. Planned giving can be as simple as name, explain, remain: Name us in your estate plan. Explain what you would like your planned gift to accomplish. Both your legacy and your impact remain forever.

76. It's easier than you think to be remembered. Let's talk about planned giving and how we can fit into your charitable picture.

77. Did you know that, under certain circumstances, you can make a once-in-a-lifetime “tax-free” Qualified Charitable Distribution from your IRA in exchange for a life income gift? It can count toward your required minimum distribution, plus you’ll enjoy tax benefits and dependable income! Contact us to find out if you’re eligible for this opportunity.

78. Most Americans (over 68 percent!) don’t have a will. Many don’t even realize that having a will is critical to protect their loved ones. If you’re putting off creating or updating your will, don’t wait! Use our free online will planner to create a legal document that protects your family, your assets, and your legacy. You can even leave a gift to your favorite nonprofit.

79. A Charitable Gift Annuity, or CGA, is a powerful way for you to earn income for life while also supporting our mission. Consider these benefits:

- Dependable income for life
- Significant tax savings
- Creation of a legacy that supports our mission
- The knowledge that you’re making a difference

Contact us today to find out if this planned gift is the right option for you.

80. Did you know you can leave us a gift through your will? Called a charitable bequest, it can be a specific amount of money, an asset such as appreciated stocks, real estate, or a portion of your estate. It’s the easiest planned gift to make—and the most popular among our donors. Why not shape your legacy today, and support your favorite cause for future generations?



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