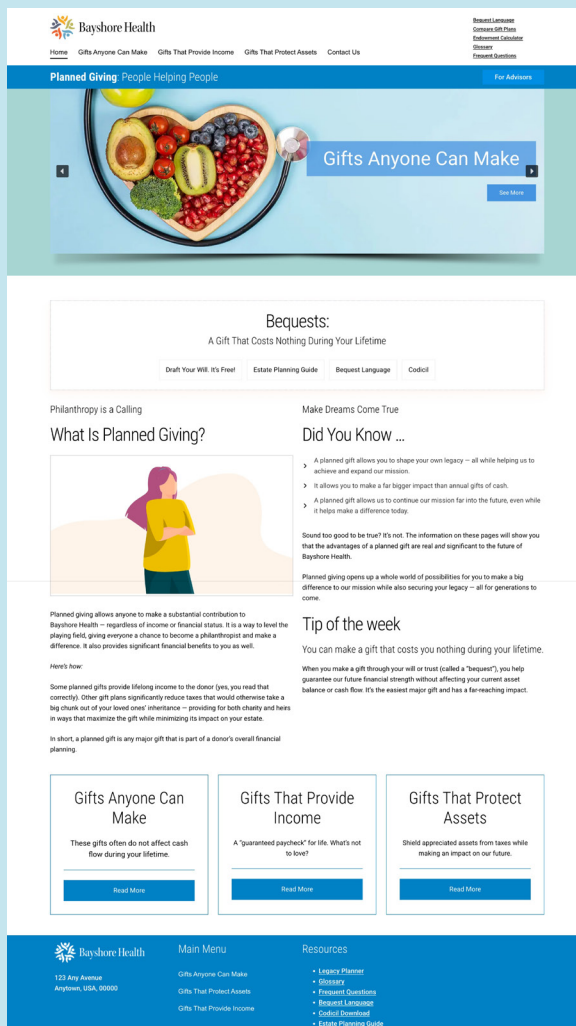


Legacy Micro Planned Giving Website

The Turnkey Tool That Builds Legacy Gifts

If you're *even* thinking about planned giving, you need the Microsite.

LegacyMicro™ is the fastest, easiest way to launch or upgrade your planned giving presence. Built specifically for lean teams, it delivers a professional, donor-friendly experience without the tech headaches, long delays, or high costs. Trusted by advisors and embraced by donors, it's your low-risk, high-reward foundation for growing legacy gifts—starting today.



Your Donors Are Thinking About Their Legacy. *Are You?*

More features than any other product in its category.

▶ JUMPSTART LEGACY GIVING—TODAY.

Move from “we should do planned giving” to “we are doing planned giving.”

▶ MAJOR PRESENCE. MODEST BUDGET.

Project **top-tier credibility**—without top-tier cost.

▶ HIGH-IMPACT. BUDGET-FRIENDLY.

Establish a **powerful planned giving presence** for less than a cup of coffee a day—building donor trust and board respect.

▶ SET IT AND FORGET IT.

Planned giving isn't always a top priority. This site **works in the background** while you focus on your priorities.

▶ ENTERPRISE-GRADE. ZERO BURDEN.

We set it up. We manage it. You reap the rewards—**no tech skills needed.**

▶ ADVISOR-APPROVED. DONOR-READY.

Trusted advisors **open the gateway** to lasting gifts—and our platform helps you earn that trust instantly.

▶ CAPTURE INTENT WHILE IT'S THERE.

When a donor's inspired, **timing matters.**

▶ ONLINE WILL PLANNER.

Add LegacyPlanner™—or the more affordable LegacyOrganizer™—and give donors a simple next **step toward creating a legacy.**

Built by the pioneers of online legacy fundraising.



800-490-7090
succeed@plannedgiving.com
Tampa, Florida

Legacy Micro

Who Is This For?

- › **Small to mid-sized nonprofits** without a full marketing team
- › **Lean fundraising teams chasing big goals** on tight budgets
- › **Leaders who need planned giving credibility**—fast, simple, and affordable
- › **Boards that value legacy** and long-term sustainability
- › **Fundraisers who want to build instant trust** with donors and advisors
- › **Professionals who want to look good** to their board—and their peers
- › **Anyone tired of overpriced “custom” projects** that take months and go nowhere

All You Need. Nothing You Don't.

- › **BRANDED PLANNED GIVING MICROSITE.**
Fast, turnkey, and beautifully customized.
- › **ALL PLANNED GIFTS EXPLAINED.**
Plain English content—no legal jargon, no confusion.
- › **GIFT-TYPE DONOR PROFILES.**
Show donors who typically makes each type of gift.
- › **EXPLAINER VIDEOS.**
Clear. Concise. Simple.
- › **LEGACYPLANNER™ (OPTIONAL).**
A free online will planner for your donors—fully integrated, simple to use, built to boost engagement.
- › **24/7 PASSIVE EDUCATION.**
No staff hours. No follow-ups. No friction.
- › **DONOR FAQs + ADVISOR CALCULATORS.**
Trust-building tools for donors and advisors.
- › **AUTOMATIC TAX & LEGAL UPDATES.**
Always current—zero effort on your part.
- › **BEQUEST LANGUAGE & ADVISOR PAGES.**
Professional, ready-to-use tools that make giving easier.
- › **MARKETING & TRAINING RESOURCES.**
Pocket guides, marketing guide, and sample calendar.
- › **DIGITAL SUBSCRIPTION TO GIVING MAGAZINE.**
Career growth. Real success. Peer-powered inspiration.

Built by the pioneers of online legacy fundraising.



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Frequently Asked Questions

Getting Started

How much work is involved?

Very little. Just complete a short 4-page onboarding sheet—we handle the rest. It's a true turnkey solution.

How does the site go live—and how long does it take?

We send a simple connection link. Setup takes 2 minutes, and your site typically goes live within 10 days after receiving your materials.

What will the URL be—and can I customize it?

Your microsite will live under the trusted planned.gifts domain (e.g., yourname.planned.gifts). Custom domains aren't available—but planned.gifts is recognized and trusted across the sector.

Customization

Can I customize the site?

Only key elements. Full editorial and layout changes aren't possible—and most nonprofits don't need them to succeed. Options include:

- › Banner image(s)
- › Organization name & contact info
- › Featured gifts (e.g., don't accept real estate? We'll remove it.)
- › Team photos and optional LinkedIn links
- › Light accent colors to match your brand

Why can't I customize everything?

To stay scalable, stable, under \$1,000/year, the website is intentionally streamlined and runs on a shared CMS. It is curated to ensure legal accuracy, donor trust, and a seamless experience. Pro and advanced options (\$) are available for organizations that need them.

Costs and Value

Why is this so inexpensive?

We offer fully branded custom sites—but they require more time, more budget, and more back-and-forth. LegacyMicro™ is designed for fast results without the branding tax.

I've seen similar products cost thousands more.

Most do. We've kept costs low by stripping bloated branding and custom design overhead. If your organization requires strict brand alignment—think *Harvard*, *Nature Conservancy*, or *Red Cross*—LegacyMicro™ isn't the right fit.

Features and Add-Ons

Are there add-ons available?

Yes. You can add LegacyPlanner™ (online will planner) or order professional brochures, estate guides, and donor leave-behinds. Pricing varies by option.

Hosting and Platform

Can I host the content on my own servers?

No. The content is copyrighted and must remain on our platform to ensure legal accuracy and critical updates.

Why Planned Giving Matters

Is Planned Giving really that important?

Absolutely. Even *Forbes*, *The New York Times*, *The Wall Street Journal*, and *The Washington Post* call planned giving a nonprofit's ultimate lifeline. It builds lasting trust and credibility, it's not just for the wealthy, and it multiplies giving by 200–300%. Just a handful of planned gifts can outperform hundreds of annual donations.

Why a Planned Giving Website?

Because only 5% of donor wealth is in cash. If your website only asks for credit cards, you're missing the other 95%—stocks, real estate, IRAs, and more. A planned giving website builds trust, credibility, and confidence with donors and their advisors.