

# ENGAGE DONORS ON FACEBOOK

Planned  
Giving  
Social Media  
Posts





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# INTRODUCTION

## 75 Planned Giving Facebook Posts to Get Your Prospects Thinking

### How to use this content:

Planned giving is simple. It takes time and cultivation to get your donors and prospects to consider naming your organization as a beneficiary. *Demystifying some complexities and misconceptions is a critical but necessary part of the process.* The first step is to get them thinking about planned giving and to remind them that your organization is willing, ready, and able to accept planned gifts. Invite them to consider naming your organization, and open the door for them to start a dialogue on the topic or continue the conversation. .

### Next Steps:

Of course, you should already be talking about planned giving. If you're not, you can personalize the 75 Facebook posts that follow and use them to keep you in the minds of your donors and prospects as they determine both their charitable and financial plans. *These pre-generated posts can serve as an editorial calendar, or you could simply sprinkle them in with your current social media plan.* Publishing 2 or 3 of them each week can give you 6 to 9 months' worth of planned giving content.



## Bonus Creative Suggestions:

- ⇒ ***Interview existing members of your legacy society to develop vignettes about their giving.*** Include their pictures. 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 with 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.

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## The Posts:

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 by regularly supporting our work, volunteering your time, or supporting our organization, please consider a planned gift.
3. Please notify us if you plan to name us in your estate plan. We would like the opportunity to properly thank you during your lifetime.
4. There are major benefits to planned gifts. Tax incentives, estate optimization, 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 thoughtful and strategic way to invest in our mission without jeopardizing your nest egg.
6. Did you know that many planned gifts are revocable? We appreciate your thinking about naming us in your estate and hope it stays that way! Please know, however, that if your financial picture changes during retirement or if unforeseen circumstance come up later in life, you can 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.
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.
9. In many instances with planned gifts, an ordinary signature can make an extraordinary difference.
10. One of the simplest and quickest ways to leave a planned gift is by naming us as a beneficiary to a retirement account, investment account, savings or checking account, or insurance policy.
11. More than half of 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.
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. It's a simple and 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 us is to tell people about your intention. Both come at no cost to you today and will have a long-term impact on our organization.



14. How would it feel knowing that you can be an incredible support to us with no impact on your current lifestyle or your family's financial security? We would like to tell you a little more about planned gifts – why they are an advantaged way to support us, and how you would receive tax benefits from different vehicles.
15. We kindly ask you to remember us when planning your estate, defining your legacy, and evaluating charitable interests. Your planned gift could change the world for someone you will never have the opportunity to meet.
16. The bequest is one of the most common planned gifts. You can make a planned gift to us through a bequest by simply naming us in your will.
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.
18. 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.
19. Every single one of these is false: I'm too young to do estate planning. Estate planning is only for the super rich. Estate planning is complicated and expensive. The government will take care of my estate? We did our wills 30 years ago so there's no need for further planning.





20. 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, or appreciated securities – or you might prefer to bequeath a certain percentage of the remainder of the estate after paying all debts, costs, and other prior legacies.
21. 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 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.
22. Writing a will can be one of the least expensive legal documents to prepare and is usually 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.
23. 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 say something like "If a child does not survive you, you could bequeath the residue of the estate to us."
24. Did you know you can support organizations like ours through your 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.





25. Retirement plans are fantastic vehicles for planned giving. By designating us as beneficiary, your heirs avoid double taxation on the assets left in your retirement account. Please let us know if you decide to name us as plan administrators are not obligated to do so.
26. 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 if you pass on funds from your retirement account to your heirs.
27. 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 powerful.
28. Not all planned gifts are made by bequest or by designating a retirement beneficiary. 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 take deduction for the fair market value of your stock donation and pay no capital gains tax.
29. Thinking about supporting us with a gift of stock? Contact us before you sell the securities! 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. Transfer them to us instead.
30. Gifts of stock are 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.



31. Life insurance policies that are no longer needed to protect your family from the financial burdens of your passing can be used to fund your charitable plans by designating us as beneficiary.
32. What are the benefits of using life insurance for your planned gift? Make a gift using an asset that you and your family no longer need. Receive an income-tax deduction equal to the cash-surrender value of the policy.
33. 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 advisors.
34. 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.
35. Curious about making a real estate planned gift? You can deed your home, vacation home, undeveloped property, or commercial building to us. You may continue to use the property rent free, and then ownership passes to us when you no longer need it.
36. 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.



37. 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.
38. In some cases, gifts of personal property can be transferred to a charitable remainder unitrust that will provide the donor with tax deduction benefits and set 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.
39. 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.
40. 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.
41. What makes planned gifts that provide income so great? They are an additional source of lifetime income for you, your spouse, or other significant persons. They provide a potential increase in the income you are currently receiving from your investments. They give you an immediate tax deduction for a portion of your gift; There is no capital gains tax due at the transfer of appreciated assets to your gift plan.



42. 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.
43. What can a charitable gift annuity do for you? Give you dependable cash flow for life, regardless of fluctuations in the market. In many cases, give you payments at a rate higher than the interest you are currently receiving on investments. Give you an immediate income tax deduction for a portion of your gift and make a portion of your annuity payment tax-free.
44. 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, meet your personal goals, save on taxes, and make a gift at the same time.
45. 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 it usually elects to sell it and use the proceeds of the sale for the gift purposes you specified.
46. How do you benefit in a charitable bargain sale as a planned gift? You receive an immediate income tax deduction for the discount you took from the appraised market value of your property. You pay no capital gains tax on the donated portion of the property.
47. 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.



48. How does a retained life estate benefit you as a planned gift? You can give a significant asset but retain the security of using your property for the rest of your life. You receive an immediate income tax deduction for a portion of the appraised value of your property.
49. A charitable lead trust is one of the best tools for tax savings when transferring 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.
50. How do you benefit from a charitable lead trust? You contribute securities or other appreciating assets to the 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.
51. Estate plans are for anybody who cares about the continuation of their financial commitments, even after they have departed this life.
52. Many individuals find that one of the most gratifying aspects of their own success is the ability to provide financial support that transforms charitable goals into meaningful action. Contact us so we can discuss your plans.
53. 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 so we can discuss your goals and charitable ambitions.



54. 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.
55. Do you want to 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 collaborate with your advisors to help you make your dream a reality.
56. 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 if things change.
57. If you die without a will, the court will decide how to disburse your assets. But the court isn't aware that you may have favorite family members or that you want to remember a few of your favorite charities in your will.
58. A life worth living often leads to a gift worth giving. A no-cost revocable decision during your lifetime can lead to endless impact.
59. We are looking for a few forward-looking friends of our organization to welcome to our legacy society. Even if you wish to remain anonymous, our commitment is to help you leave a gift that makes a lasting statement about who you are and what you cared about most.
60. 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.



61. 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.
62. 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.
63. When you open a bank account, set up a retirement plan, or take out an insurance policy, a form lets you designate who will inherit the money in those accounts someday. That form can keep your money out of probate, which means no attorneys, hassle for your heirs, or extra expenses tacked onto your estate. And you can designate an organization like ours as well as individuals.
64. “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.
65. 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 ways. We would love the opportunity to tell you how simple it is to do just that.
66. 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.





67. Considering a planned gift? When you meet with your CPA, ask how a planned gift fits into your overall financial picture. There may be a solution that gives you tax and charitable benefits.
68. If it's between Uncle Sam and us, where would you want your assets to go?
69. Three incredible benefits for naming us as beneficiary to a retirement account: 1) It is revocable if you need your assets. 2) It will save your heirs a substantial amount in taxes. 3) We can be named for a fixed amount, percentage, or remaining balance.
70. The most powerful gift builds a better tomorrow. A planned gift can do just that and cost you nothing during your lifetime. Ask us how.
71. 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 help you create a legacy.
72. Your planned gift is our promise to honor your intent. Whether a percentage or a fixed amount, large or small, regardless of the gift type – we are here to help your charitable goal turn into a meaningful legacy that makes a real impact.
73. By leaving us with a planned gift, allow us to thank you in the present on behalf of how someone in the future will benefit.



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



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