Outreach Materials Included in the

Beneficiary Designations Toolkit

MARKETING (M)

Remember: you do not have to use all these materials. Feel free to improvise and add your own touch. But don't make it more complicated than it needs to be. The point of this toolkit is to make your job easier.

1) **Marketing Calendar.** Take 30 minutes and lay out your plan for the year.
2) **M1 – Beneficiary Designation postcard templates.** Do a postcard mailing 3-4 times a year. It's okay to repeat the same ones:
    a. No one will remember, and
    b. If they remember, it will reinforce your message.
3) **M2 – Display Ad**. (Note: This is in a folder so look for it.) You will need **Adobe InDesign** to open this file, so work on this with your graphic designer. There is a PDF in the folder for you to view for your convenience. Place this ad in any or all of your publications immediately. If you've purchased this toolkit, you have permission to use our stock photography (included). But we highly recommend using your own pictures. Note that you have several ad options to choose from. (Essentially, you have 5 ads.) Cycle through them all throughout the years.
4) **M3 – Solicitation Letter & Planned Giving Website Announcement**. This solicitation letter also announces your new planned giving website. It highlights gift planning benefits to increase your prospect's interest. If you wish, adapt the copy for a fundraiser's column in publications or as a secondary article in a newsletter. It's really that easy!
5) **M4 – Solicitation Letter**.
6) **M5 – Solicitation Letter with sample bequest language.**
7) **M6 – Solicitation Letter – Bequest and "stuff".**
8) **M7 – Bequest Thank You Letter.**
9) **M8 – Follow Up Bequest Letter 1.**
10) **M9 – Follow Up Bequest Letter 2.** Mail this out if no response to M8.
11) **M10 – Follow Up Bequest Letter 3.** Mail this out if no response to M9.
12) **M11 – Solicitation Letter from VP or CEO.**
13) **M12 – Solicitation & Bequest Launch.**

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RESOURCES (R)

1) **R1 - Touch Piece - 25 Estate Documents.** A majority of Americans do not have an estate plan in place. And when they leave this earth, their unfinished business creates quite hardship on family members. Here's a great "touch piece" that gently reminds them of the importance of some simple paperwork, how it helps family, and the causes they care about (like your organization). Potential uses include:
    - Email it to prospects
    - Post it online
    - Leave behind
    - Insert in any mailings
    - Give to your professional network of attorneys, CPAs, advisors, etc.

2) **R2 – Bequest and Organizational Q&A**. Adapt, revise, mail it out or post it online. Study it well for yourself, too. It's only a few pages and has basic info that will come in handy.
3) **R3 – General Intention Form.**
4) **R4 – Nonbinding Bequest Intention Notification.** Use this with any or all solicitation letters.
5) **R5 – Donor Testimonial Form.** Donor stories motivate others to give and create second time gifts. You can mail or give this form directly to your donors, or—better yet—use it to guide you (or a professional writer) in interviewing them.
6) **R6 – Sample Donor Stories.** To inspire your creativity!
7) **R7 – Codicil Sample.**
8) **R8 – Bequest Sample Language.** Keep this handy. Revise and adapt as needed.
9) **R9 – Disclaimer.** Include this (or another disclaimer from your organization's legal department) on all materials you send out.
10) **Gift Comparison Charts.** You'll need Adobe InDesign for this – your graphic designer has this. We've included PDFs so you can preview them.
11) **Estate Planning Toolkit.** This will be posted on your planned giving website. It is also a valuable leave-behind to hand out to donors, prospects, and advisors.

Three (3) complimentary copies of our Pocket Guides included.

New material is continually developed.

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