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# Planned Giving. It's Not About Money.

## Are you a legitimate charity? Perhaps on paper. Read on ...

Everyone focuses on the importance of planned giving from a financial perspective. When in fact, it's about legitimacy and credibility. If you have both, the money will follow.

### The Boring Question and the Boring Answer.

"Why does your organization need a planned giving program?"

Most over-used (over-abused?) answer: Planned giving is invaluable to an establishment's financial health... *blah, blah* ... largest inter-generational wealth transfer ... *blah, blah* ... over \$30 trillion will pass from Baby Boomers ... *blah, blah*. Enough already.

### Okay. We Get That.

The true answer is that if your organization doesn't have a planned giving program, it's not taken seriously. *You* are not taken seriously. You're seen as not planning for the future.

*So ... Why donate to an organization that's not planning?*

### People See It. And Do Not Like It.

Consider a different question, then: Why isn't your organization taking planned giving seriously?

### A Sign of Legitimacy

Planned giving is a hallmark of legitimate, prestigious organizations that are serious about long-term growth. Donors want to ensure their money goes

to a successful cause. The savviest donors are well aware of planned giving options — and they'll check them out before supporting you.

If you don't have a planned giving program, you're losing prospects. Period.

**PERCEPTION IS EVERYTHING. YOU, AND YOUR ORGANIZATION, ARE NOT TAKEN SERIOUSLY IF YOU DO NOT HAVE A PLANNED GIVING SYSTEM IN PLACE. EVEN A SMALL ONE.**

### Variety is the Spice of Funding

No two donors are alike. A program that's a perfect match for one might not work for another. Organizations with versatile planned giving options get more gifts from a wider variety of donors.

*More donors = more funding.*



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### Bigger Gifts

Only 5 percent of the nation's wealth is in liquid assets. The rest is where planned giving comes into play: retirement plans, securities, real estate — even collectibles. Planned gifts are usually a donor's largest gift to an organization. Are you happy just receiving one-time gifts of \$5, \$10, or \$200? Then you're in the wrong business.

### Easy to Give and Receive

People will appreciate you more, because it shows you care. It's not rocket science. Planned gifts are easy to market, easy to give, and easy to receive. Especially beneficiary designations.

### Accessible to All

The majority of donors aren't wealthy. Studies have found most gifts come from poor and middle-class donors. A donor may not be able to contribute anything right now, but through planned giving can offer a large amount in the future. Again, this shows you care.

### Builds Relationships

Fundraising is about relationships, and relationships are built on trust. A planned giving program helps establish that trust — and helps fundraisers cultivate more opportunities for giving. Just like businesses, charities are built on repeat "customers."

What's in a relationship? Marketing and sales. Did we mention marketing?

### Allows Donors to Leave a Legacy

Donors don't give just to help a cause — they give because it makes them feel good.

Planned giving is a way for anyone to leave a legacy (i.e., feeling good), and that appeals to everyone — whether they get a hospital wing named in their honor or make it into a nonprofit's newsletter.

In a way, planned giving is a gift you give to a donor.

And making people feel good is a major part of marketing and sales. 🤖

PLANNED GIVING IS A HALLMARK OF PRESTIGIOUS ORGANIZATIONS.

ALLOWS PEOPLE TO LEAVE A LEGACY. NOW THAT'S SOMETHING YOU CAN TAKE WITH YOU.

PLANNED GIVING IS A PEOPLE BUSINESS. NOT A LEGAL BUSINESS.™



As thought leaders in the planned giving world, we publish, on average, 5 or 6 articles each week.

This frequent publishing schedule is part of our mission: Bringing you the tools, knowhow and insights to keep your organization ahead of the curve, while also helping to advance your career.

We practice what we preach (write), too. This in itself sets us apart from vendors who are just focused on making another sale.

Let me know how you're doing. And let me know how we're doing.

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