

21 Touches on a Planned Giving Prospect

1.



SHE SEES THE PAGE ON YOUR WEBSITE WITH STORIES OF PEOPLE JUST LIKE HER WHO HAVE MADE PLANNED GIFTS.

2.



SHE GETS AN EMAIL FROM YOU WITH A HELPFUL ARTICLE ON ESTATE PLANNING.

3.



SHE SEES A PLANNED GIVING AD WHILE FLIPPING THROUGH YOUR ORGANIZATION'S NEWSLETTER.

4.



SHE RECEIVES AN INVITATION TO A DONOR EVENT.

5.



SHE GETS A FRIENDLY JUST SAYING HI EMAIL FROM YOU.

6.



SHE RECEIVES A HAPPY THANKSGIVING CARD.

7.



SHE ACCEPTS THE INVITE TO LIKE YOUR ORGANIZATION'S FACEBOOK PAGE WHERE PLANNED GIVING MESSAGES APPEAR AT LEAST WEEKLY.

8.



SHE UNEXPECTEDLY RECEIVES A HAPPY HALF BIRTHDAY CARD.

9.



SHE NOTICES YOUR EMAIL FOOTER: "A GIFT THROUGH YOUR WILL COSTS YOU NOTHING DURING YOUR LIFETIME."

10.



SHE RESONATES WITH A STORY YOU MAILED WRITTEN FROM THE POINT-OF-VIEW OF ONE OF HER PEERS WHO MADE A PLANNED GIFT

11.



SHE GETS AN EASY WAYS TO GIVE POSTCARD TOWARDS THE END OF THE YEAR.

12.



SHE APPRECIATES GETTING A PHONE CALL FROM SOMEONE INFLUENTIAL AT THE ORGANIZATION.

13.



SHE LOVES THE HANDWRITTEN THANK YOU NOTE THAT CAME AFTER HER LAST DONATION.

14.



SHE IS HONORED TO BE ASKED TO TELL HER STORY OF BEING A SUPPORTER.

15.



SHE APPRECIATES THE FREE BOOK ON ESTATE PLANNING YOU SENT HER.

16.



SHE SMILES AT THE VALENTINES DAY POSTCARD SHE GETS "ARE YOU OUR SECRET ADMIRER?"

17.



SHE READS ALL OF THE INFORMATIONAL ARTICLES YOU SEND DURING NATIONAL ESTATE PLANNING AWARENESS WEEK

18.



SHE ACCEPTS YOUR INVITATION TO TAKE HER ON A TOUR OF YOUR ORGANIZATION'S NEW FACILITY AND OUT TO LUNCH AFTERWARDS.

19.



SHE LAUGHS AT THE CARTOON ABOUT WRITING YOUR WILL ON YOUR FACEBOOK PAGE.

20.



SHE GOT TEARY EYED WATCHING THE VIDEO YOU SENT HER WITH AN ELDERLY MAN TALKING ABOUT THE LEGACY HE WANTED TO LEAVE TO HIS FAMILY AND THE CAUSES HE CARED ABOUT.

21.



SHE NOTICES THE MESSAGE PRINTED ON HER MONTHLY GIVING RECEIPTS: "PLEASE CONSIDER MAKING US PART OF YOUR LEGACY WITH A GIFT IN YOUR WILL."

Then one day, she finds herself sitting in her attorney's office to update her will. She says, "There's a charity I'd like to include in my will..."