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# INTRODUCTION

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*This toolkit will transform your  
career in gift planning. Period.*

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# First Things First

Planned Giving in a Box® is for an organization that's:

- Beginning a new planned giving program.
- Strengthening an existing program.
- Putting its "house in order" to plan for the future.

It is an indispensable tool for any shop that does not administer life income and complex gifts.

**The Box** is a turnkey product that's designed to help you grow and prosper. And it helps you keep the big picture in mind. Although designed for those who do not administer life income and complex gifts, it does establish a solid foundation for such gifts in the future.

We have broken the process down into three, easy-to-implement modules. It simply can't get any easier and more comprehensive than this.

## Module I

### *Marketing and Outreach*

This module provides you with a suggested month-by-month implementation timeline; ready-to-go, customizable marketing resources; practical know-how and advice on how to proceed; and a marketing-plan-at-a-glance — all to help you keep the big picture in mind. Marketing and fulfillment materials allow you to reach out to your identified prospects more effectively than you can do with your limited staff resources. Those who respond to your marketing efforts can then be pursued one-on-one for planned gifts.

**Module I** contains all the tools you'll need to perform quality marketing and outreach to create these leads.

## Module II

### *Back Office Operations*

Believe it or not, most planned giving programs fail not because the nonprofit lacks generous donors, but because they have not put in place the infrastructure to ensure *planned giving success*.

Often, an organization will start a planned giving program with great enthusiasm, but their efforts will stall due to insufficient or misguided preparation. Long-term success starts with the basics, and a key step is to put your house in order with **Module II – Back Office Operations**.

## Module III

### *Building Donor Relationships*

Donors make planned gifts to charities when people *they know, trust or respect* ask them to make long-term commitments to causes they believe in.

You need to have the tools to identify the prospects, qualify them, visit them, ask for gifts, and steward them. Donors don't make gifts because you have a great planned giving marketing plan. They make gifts because you *talk* to them. On the other hand, when you have meaningful relationships and an effective back office, your marketing plan will produce the kind of leads that allow you to close more planned gifts. Box **Module III** will help you to ask for and close more planned gifts to support your charity for the long-term while building an endowment.

## Implementation

When used together, these three modules enable you to build an effective planned giving program that delivers significant revenue from bequests, retirement plans, life insurance policies and other revocable gifts that anyone can make. These gifts are simple to ask for and receive using the tools and techniques in **The Box**. Since these sources typically account for over 90% of all planned gifts, this is where you start to build your planned giving program. Basically, these are Beneficiary Designation gifts.

### Each module stands on its own.

If you bought just one module to help you meet a particular need at your organization, it is an effective and efficient way to move your planned giving program forward. Each module comes with its own "Plan At-A-Glance" to show you the big picture, as well as *step-by-step* instructions to cover the details.

The best results, however, come from deploying the three modules together, using the *suggested schedule* on the next page.

Use this color coordination for practical purposes.

|               |   |
|---------------|---|
| GREEN MODULE  | Module I – Marketing and Outreach         |
| RED MODULE    | Module II – Back Office Operations        |
| YELLOW MODULE | Module III – Building Donor Relationships |

Again, this is a suggested schedule. But if you do follow our this schedule, your weekly commitment is one to three hours a week. Can you handle it?

Look at it this way ... as you implement **The Box**, it will be an education in itself! So it will help your career too.

Continued success!

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#### IMPORTANT:

**Module I** has more tools than the suggested outline covers on the next page. Use as many as you wish. Again, this is only a *suggested schedule/outline*.

**Print the following pages out in color.**

## Planned Giving in a Box Complete Implementation

*(Below suggested schedule applies to all three modules. Each module can be purchased separately. Feel free to improvise.)*

| Week  | Project   | Module |
|-------|---|--------|
| 1-2   | Are You Ready? Evaluating Your Mission  | II     |
| 3-4   | Marketing and Outreach – Planned Giving Website <b>(included)</b>             | I      |
| 5-7   | Creating a Planned Giving Prospect List                                       | III    |
| 8-9   | Marketing and Outreach – ways-of-giving brochure <b>(not part of package)</b> | I      |
| 10-11 | Getting Your Board on Board   | II     |
| 12    | Infrastructure – Counting and Valuing Gifts                                   | II     |
| 13-14 | Marketing and Outreach – First Solicitation Letter – Ways and Whys of Giving  | I      |
| 15    | Infrastructure – Gift Acceptance Policies                                     | II     |
| 16    | Infrastructure – Gift Agreements  | II     |
| 17-18 | Marketing and Outreach – Display Ad – Giving Overview                         | I      |
| 19    | Infrastructure – Estate Administration  | II     |

|       |  |     |
|-------|--|-----|
| 20    | Infrastructure – State and Federal Regulations   | II  |
| 21-22 | Marketing and Outreach – First Postcard – Bequests                                     | I   |
| 23    | Understanding the Basic Tools  | III |
| 24    | Approaching the Best Planned Giving Prospects – Generational Cohorts                   | III |
| 25    | Approaching the Best Planned Giving Prospects – Events that Prompt Planned Giving      | III |
| 26-27 | Marketing and Outreach – Editorial Piece – Legacy Benefits                             | I   |
| 28    | Approaching the Best Planned Giving Prospects – Meeting Personal Planning Objectives   | III |
| 29    | Approaching the Best Planned Giving Prospects – Qualifying Visits                      | III |
| 30-31 | Marketing and Outreach – Second Solicitation Letter – Life Insurance, IRAs, More       | I   |
| 32    | Approaching the Best Planned Giving Prospects – Having the Planned Giving Conversation | III |
| 33    | Approaching the Best Planned Giving Prospects – Making the Ask                         | III |
| 34-35 | Marketing and Outreach – Second Editorial Piece – Humorous Take on Bequests            | I   |
| 36    | Stewardship Society – Membership Criteria and Benefits                                 | III |

|       |  |     |
|-------|--|-----|
| 37    | Stewardship Society – Membership Materials                               | III |
| 38-39 | Marketing and Outreach – Donor Letter/Newsletter – Stewardship           | I   |
| 40-41 | Stewardship Society – Brochure <b>(we can develop one for you)</b>       | III |
| 42-43 | Marketing and Outreach – Second Postcard – Gifts of Life Insurance       | I   |
| 44-45 | Stewardship Society – Outcomes-Based Events                              | III |
| 46-47 | Marketing and Outreach – Third Editorial Piece – Popular Revocable Gifts | I   |
| 48-49 | Planning for Next Year   | II  |
| 50-51 | Marketing and Outreach – Third Postcard – Retirement Plans               | I   |
| 52    | Program Evaluation   | II  |
| N/A   | Marketing and Outreach – Solicitation Letter – Year-End Giving           | I   |
| N/A   | Marketing and Outreach – Postcard – Year-End Giving                      | I   |

In just one to three hours per week over 52 weeks, you can implement the entire program and start raising money for the present and the future of your organization. Or if you prefer, implement more aggressively to jump-start your program. The supplied schedule maintains the one to three hours-a-week implementation. In some cases, more than one week has been allocated to larger tasks that may take two or three hours of your time.

## Module I Implementation:

### Beneficiary Designations Website and Outreach

*(If you purchased Module I only; for illustrative purposes and should be modified)*

| Month     | Website   | Postcards   | Letters   | eBroadcasts  | Display Ads                                     |
|-----------|---|---|---|--------------|---|
| January   | Develop a planned giving website that is on 24/7. |   | Educational "solicitation" letter about planned giving options. |              | Develop a display ad and run it multiple times. |
| February  |   | Postcard 1: Bequests and Estate Planning (Option: implement Valentine's |   | eBroadcast 1 |   |
| March     |   |   | Thank them for their support.                                   |              |   |
| April     |   | Postcard 2: Giving through retirement plans                             |   |              |   |
| May       |   |   |   |              |   |
| June      |   | Postcard 3: Beneficiary Designations                                    |   | eBroadcast 2 |   |
| July      |   |   | Introduce / remind / invitation Legacy Society event.           |              |   |
| August    |   |   |   |              |   |
| September |   | Postcard 4: Appreciated Assets and Year End                             |   |              |   |
| October   |   |   | Impact of planned gifts?  |              |   |
| November  |   | Postcard 5: Thanksgiving postcard (thank your donors)                   |   | eBroadcast 3 |   |
| December  |   | Postcard 6: Year End (early December)                                   |   |              |   |



## Additional Content Included with Module I

*(Beneficiary Designations Website and Marketing Outreach)*

### 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. There is a copy already here on the previous page.
- 2) **M1 – Beneficiary Designation postcard templates.** Do a postcard mailing 3-4 times a year.
- 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.**

## 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.

## Estate Planning Guide and Toolkit for Your Prospects

Over 50% of Americans Don't Have a Valid Will in Place. That's Your Audience.

Easy to give and easy to receive, bequests are a popular way to leave a legacy.

Take the fear out of estate planning by educating your prospects on how to write a will, plan a bequest, and make other long-term arrangements in a way that aligns with their faith and meets their personal goals.

This simple, customizable Estate Planning Kit doubles as a networking tool. Use it as leave-behind on donor visits. Give it out at Legacy Society luncheons, major donor gatherings, seminars or board meetings. Or hand them to advisors to pass on to their constituents.

The Estate Planning Kit includes:

- Estate Planning Guide (A simple, step-by-step guide to estate planning.)
- Will Starter Kit (Begin your will before you meet with your attorney.)



Choose from over 20 attractive cover designs — or we can design a special one just for you. \$1,995.00, customized with your colors, photos, logo and contact information.

## Planned Giving Postcards

In a noisy world, they get your message heard.

- ✓ Engage, inform, raise awareness of your brand and your mission.
- ✓ An attractive and welcome 60-second read.
- ✓ Affordable direct mail for multiple touches.
- ✓ Solid lead-generation tool.



## Ways-of-Giving Brochures

Customizable with your name, logo, colors and pictures. These affordable brochures are must-have publications for any non-profit. Each explains popular planned gifts for any non-profit. Each explains popular planned gifts in plain English with helpful examples and planning tips. Covers: Cash vs. Property, Conventions Gifts (Bequests, Retirement Assets, Life Insurance), Life Income Gifts (CGA, DGA, Unitrust, Annuity Trust, Lead Trust). Of course, any gift plan can be eliminated or added.

## The Pocket Guide

This is the insider's guide to what planned gifts can do for donors and for your organization. Slip this handy booklet into your pocket before your next round of prospect calls. It's not another way-of-giving brochure — it's a "why of giving" that helps you better understand the upsides and downsides of different giving options for both you and your prospects.

Use the guide to...  
and it's the

Now available in three editions\*

- ✓ For Fundraisers
- ✓ For Board Members, Volunteers, Donors and Prospects



# Planned Giving Reference Chart

PlannedGiving.com

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## Planned Giving Reference Chart

|   | Cash   | Securities  | Real Estate  | Personal Property   | Bequest   | Retirement Plan Assets, IRA  | Life Insurance   | Retained Life Interest  | Bargain Sale   | Charitable Gift Annuity  | Charitable Remainder Trust   | Charitable Lead Trust  |
|---|--|---|--|---|---|--|--|---|--|--|--|--|
| How does it work?                               | Give cash  | Gift appreciated securities   | Give appreciated real estate   | Gift artwork, collectibles, equipment or other types of tangible property | Simplified form of gift planning (given now, give later)                                    | Name NPO as the beneficiary of the plan                                | Name NPO as beneficiary and owner of a policy donor owns             | Give real estate but keep the right to use and enjoy it for life            | Sell real estate or other valuable property to NPO for less than fair value          | Simple gift contract that provides lifetime payments to one or two persons | Trust that pays income to life or for a term of years to donor and/or others. Assets ultimately benefit NPO      | Trust that makes payments to NPO for a period of years. Assets ultimately pass to donor or heirs                   |
| A good fit for donors who want to...            | Maximize the deduction, minimize the gift duties | Avoid tax on capital gains, afford a larger gift to NPO                               | Make a substantial gift, avoid capital gains tax, receive a large income tax deduction | Put assets donor no longer needs or can maintain to good use              | Make a gift that costs nothing during donor's lifetime                                      | Avoid double taxation at death; give tax-advantaged assets to heirs    | Make a gift at little cost   | Make a significant gift that doesn't affect donor's lifestyle               | Make a significant gift that doesn't affect donor's lifestyle                        | Supplement income with steady payments that are partially tax-free         | Diversify assets, avoid or defer capital gains tax, secure chain-greater income and provide inflation protection | Reduce gift and estate taxes on assets donor passes to heirs; lower income tax liability; retain control of assets |
| How does donor make the gift?                   | Write a check or give online now                 | Contribute long-term appreciated stock or other marketable securities                 | Donate the property to NPO   | Donate tangible personal property related to NPO's tax-exempt function    | Name NPO in will or living trust by designating a specific amount or a share of the residue | Name NPO as whole or partial successor beneficiary on your plan's form | Donate a paid-up policy donor no longer needs                        | Give real estate to NPO but retain lifetime use                             | Sign a contract to sell property to NPO at a discounted value                        | Establish a gift annuity contract with NPO that pays a set income for life | Create a trust that pays income to donor and/or others; principal (remainder) ultimately goes to NPO             | Create a trust that pays income to NPO; principal (remainder) ultimately returns to heirs or donor                 |
| Donor Benefits (and how to describe it to them) |  |   |  |   |   |  |  |   |  |  |  |  |
| Reduce estate tax                               | Removes taxable assets from the estate           | Removes taxable assets from the estate  | Removes taxable assets from the estate   | Removes taxable assets from the estate                                    | Donation exempt from federal estate tax   | Donation exempt from federal estate and income tax                     | Donation exempt from federal estate tax                              | Removes taxable assets from estate  | Removes taxable assets from estate   | Removes taxable assets from estate   | Removes taxable assets from estate   | Can remove taxable assets from estate  |
| Reduce income tax                               | Immediate deduction for full value               | Immediate deduction for full value  | Immediate deduction for full value   | Immediate deduction for full value if NPO can use the asset               | Heirs will avoid income tax   | Heirs will avoid income tax  | Current income tax deduction for paid-up policy                      | Deduction for value of the asset, less value of your right to keep using it | Deduction for value of the asset, less value of your right to keep using it          | Deduction for gift portion of asset  | Deduction for gift portion of asset  | Limited  |
| Reduce or eliminate capital gains tax           |  | Complete avoidance  | Complete avoidance   | Complete avoidance  | Complete avoidance  | Complete avoidance   | Complete avoidance   | Complete avoidance  | Complete avoidance   | Partial avoidance  | Partial avoidance  | Varies   |
| Get income back from the gift                   |  |   |  |   |   |  |  |   |  | Fixed payments for life for one or two individuals                         | Fixed payments for life for one or two individuals   | Property reverts to donor, or to heirs with reduced gift and estate taxes  |
| Give an asset but keep enjoying it              |  |   |  |   | Control of assets during lifetime   | Continue to take withdrawals from plan during lifetime                 | Use of asset during lifetime   |   |  |  |  | Best for assets expected to appreciate rapidly   |
| More  |  | Sell like the stock? Use cash to buy at today's price and lock in a higher cost basis | Coordinate with charity before making donation   | Can be used to make a significant gift without cash outlay                | Make a substantial gift when donor no longer needs the assets                               | Often overlooked and easily given                                      | Simple to set up; small financial commitment for large ultimate gift | Coordinate with charity before making donation                              | Use proceeds to help fund needs at a later stage in life (retirement facility, etc.) | Ensures NPO's future strength  | Ensures NPO's future strength  | Ensures NPO's future strength  |
| How does it benefit NPO?                        | Delivers immediate benefits                      | Delivers immediate benefits   | Delivers immediate benefits  | Delivers immediate benefits   | Ensures NPO's future strength   | Ensures NPO's future strength  | Ensures NPO's future strength  | Ensures NPO's future strength   | Ensures NPO's future strength  | Delivers immediate benefits  | Delivers immediate benefits  | Delivers immediate benefits  |

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