INTRODUCTION

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!

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.

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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 **(included)**	I
5-7	Creating a Planned Giving Prospect List	III
8-9	Marketing and Outreach – ways-of-giving brochure **(not part of package)**	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

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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

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37	Stewardship Society – Membership Materials	III
38-39	Marketing and Outreach – Donor Letter/Newsletter – Stewardship	I
40-41	Stewardship Society – Brochure **(we can develop one for you)**	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)			

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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.

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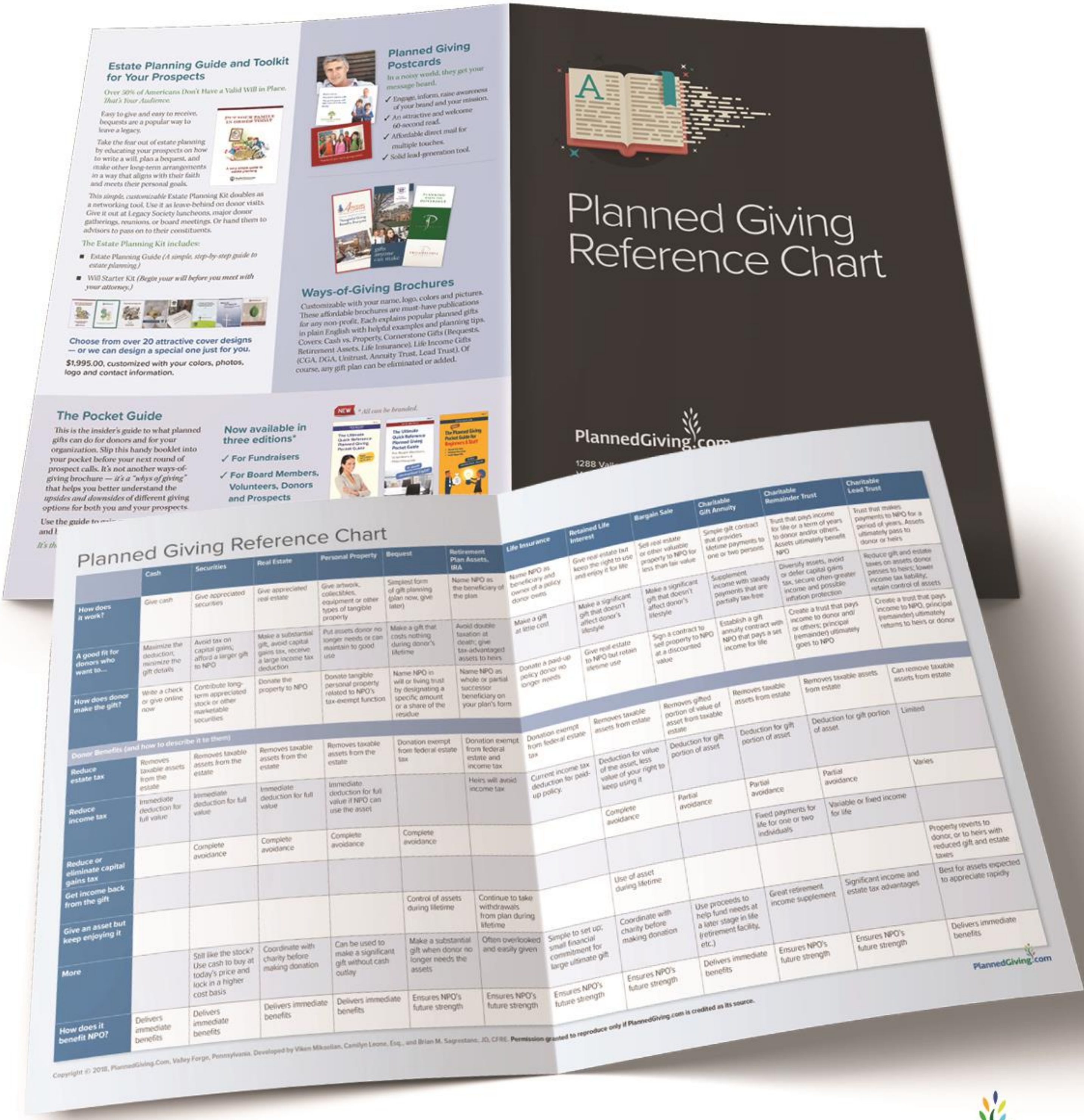

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