

11 Tips and Strategies

To Supercharge Marketing Planned Gifts



Planned gifts can get complicated. Marketing them shouldn't be.™

Follow these easy-to-implement 11 verified tips, and you'll be able to create game-changing strategies and marketing materials that grab prospects, inspire donors, and transform philanthropic dreams into life-changing experiences.

Below is a quick summary. Details at www.pg.tips/strategies.

Your Own Internal Resources

You'd be surprised at the resources you already have. We show you where these free gems are.

Direct Mail or Junk Mail?

Yes, your direct mail is junk mail. But guess what? It works. Learn how to grab interest and produce results.

Planned Giving Solicitation Letters

Solicitation letters are part and parcel of any fundraising program. But planned giving letters need a special touch — learn even how you drop them in the mail.

Digital Outreach

Social media is a useful addition to your marketing toolbox. Maximize its effectiveness, along with a free download: *75 Planned Giving Social Media Posts*.

Online Will Planner

Bequests are "hot." Learn why all online will planners *are the same*, but using them properly with your planned giving website is what makes the difference.

The Planned Giving Newsletter

Readership of planned giving newsletters has plummeted. If you must have one, we've got pointers to help it shine.

Media Sources

Creative marketers always tap into media — TV, radio, newspapers, even community newsletters and e-zines. Here are some pointers to help you hit a home run.

Leave-Behind Brochures

Do you have materials to share when you're meeting with donors? What if someone asks for a Ways-of-Giving brochure? Discover what you need to educate and inspire.

Online Presence

Do you have an intuitive planned giving website? Linking to it from context sensitive pages including your will-planner? Showcasing your donors? Featuring your Legacy Society? Learn to maximize your digital footprint.

Ground Presence and Voicemail

These are two ignored tools, but easiest to implement. One is free. The other can be had for \$75.

Bonus Tip: Your Signature Line

We'll show you how useless most signature lines are and how to transform a simple one into a tool that drives donations.

