

Website Module*

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Beneficiary Designations Website and Toolkit

Over 90% of all planned gifts are beneficiary designations. They are simple to give, easy to arrange, and usually do not require an attorney. Any person who cares about your mission — rich or poor, educated or not — can make these gifts.

So forget about Unitrusts and Lead Trusts. They're complicated and very uncommon. By simply promoting Beneficiary Designations to your prospects, you will see both your organization and your career grow.

And speaking of simple, this Toolkit makes it ridiculously swift, effortless and trouble-free for you to get the word out about the easiest, most popular planned gifts.

Over **1,250** Hours Invested in this Product

90% of planned gifts with 10% effort.

Included:

- ▶ Planned giving website
- ▶ Donor outreach materials
- ▶ Education tools for your staff

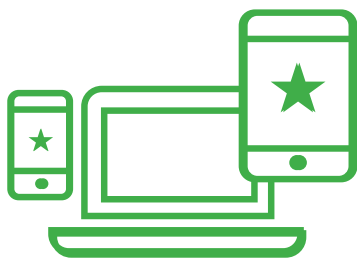
Why buy?

- ▶ No expertise required
- ▶ Simple to implement
- ▶ Quick results

Constantly updated

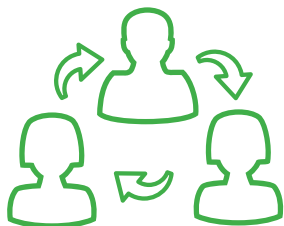


*For all Modules visit <https://pg.tips/box>



PLANNED GIVING WEBSITE

- ✓ Beneficiary Designations in simple, plain, English*:
 - Bequests
 - Cash
 - Appreciated Securities/Stocks, Investments Fund Accounts
 - United States Savings Bonds
 - Bank Accounts
 - Jointly Held Accounts
 - Life Insurance
 - IRAs
 - CDs
- ✓ 100% branded to reflect your existing website: customized with your name, logo, and contact information.
- ✓ Customized downloadable *Estate Planning Guide*.
- ✓ Online submission form.
- ✓ “What is Planned Giving” video
- ✓ All your pages are hosted under our unique search-engine-friendly address URL: plannedgiving.org (we own this domain)
- ✓ Social media integration — all pages tied into your network
- ✓ High density keywords for SEO (Search Engine Optimization)
- ✓ Discounts to upgrade your organization's planned giving website as your program grows.



MARKETING OUTREACH TEMPLATES*

- ✓ **Postcards (two).**
Professionally designed. Just drop in your photos, logo and name, and simply have it printed and mailed.
- ✓ **Display Ads.**
With 8 sample variations.
- ✓ **Bequest solicitation, "thank you", acknowledgement letters.**
Simply customize and mail!
- ✓ **General solicitation letter.**
Simply customize and mail!
- ✓ **Intention Form.**
- ✓ **Sample Marketing Plan.**
Good document to hand to your boss. Covers what to do, why, when to mail, display ads, and more. *Adobe InDesign Required.



EDUCATIONAL TOOLS

- ✓ Pocket Guide for Fundraisers (3 copies)
- ✓ Pocket Guide for Board Members (3 copies)
- ✓ Gift Comparison Charts (10)
- ✓ One-hour telephone consultation to review marketing plan