

12-Month Planned Giving Marketing Plan



Includes:

What Works, What Doesn't

Resources/Tools

Month-by-Month Implementation

"The perfect how-to for the small to medium-size shop."



Valley Forge, Pennsylvania

800-873-9203

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Disclaimer

This publication is designed to serve as a marketing tool, not as a legal guide. It is not intended to provide legal, tax, investment, or other professional advice, and it may not be relied on for such advice. For assistance in specific cases, obtain the services of a competent attorney or other professional advisor.



We're not your average planned giving firm.

We offer tools to improve your marketing; time- and money-saving downloadable copy for brochures, articles, letters, ads, and postcards; start-to-finish planned giving marketing toolkits; additional copies of this *12-Month Planned Giving Marketing Plan*; Joe McKay's popular *Planned Giving Policy Manual*; *The Ultimate Quick Reference Planned Giving Pocket Guide*; personal stories and reflections from your peers; and anything that helps you re-charge and re-focus.



Remember us next time you are under a tight deadline with your publication or need to get your planned giving newsletter out. We probably have the article or content you require. Have a question? Our FAQs cover gift plans, tax details, and all aspects of marketing.

Read *Planned Giving Tomorrow*, the *only* planned giving marketing magazine for *all* fundraisers.

Follow our nationally recognized blog. Warning: *our contributors tell it as they see it, and they're never bland or tame.*

PlannedGiving.Com is your first — *and last* — stop for all your planned giving needs.



Located in
Valley Forge, Pennsylvania

 **800-873-9203**



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Why a Planned Giving Marketing Plan?

Fact: fundraisers who even dabble in planned giving earn significantly more than their counterparts. *That's because they provide a service more valuable and lasting for their organization.* And there's never been a better time for Planned Giving. Why?

- Because your annual gifts are down, and your need for long-term, stable endowment is greater than ever before.
- Because less than 5% of this nation's wealth is in cash (and this Marketing Plan will open the door to the other 95%).
- Because your best prospects are already hearing about planned gifts from the charity down the street.
- Because this Marketing Plan is the perfect tool to start a Planned Giving program, or strengthen an existing one.
- Because over 85% of all planned gifts are “gifts anyone can afford” — gifts through a will (often called “bequests”^{*}), gifts of a retirement account, gifts of paid-up life insurance, and gifts of appreciated securities (actually, appreciated “anything” that can be appraised and sold).

Why “Gifts Anyone Can Afford” Are Important

- It takes *no expertise or specialized staff* to promote and accept them. You do not need a lawyer, bank, or financial advisor on staff. You can start marketing and closing gifts that make a big difference *today*.
- Most of these gifts can be marketed as “gifts that cost nothing during your lifetime.” Why? Bequests are made after one's lifetime, when insurance, IRAs, and securities have already been paid for and are just sitting there. *They're perfect for donors who worry they can't afford a cash gift.*

Gifts Anyone Can Afford:

- Gifts Through One's Will
- Appreciated Securities
- Appreciated “Anything”
- Retirement Plans
- Life Insurance



Less than 5% of this nation's wealth is in cash.



^{*}We prefer to call these “gifts through one's will.” Why? Because most folks out there do not recognize the terms “bequest” and “bestow.” Others think a “bequest” is something that relates only to rich people. So we don't use those words and we recommend you don't either.

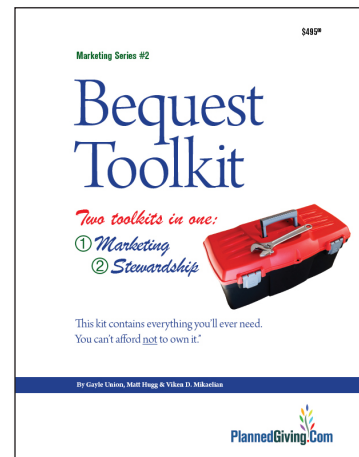
What Works & What Doesn't

What Doesn't Work: "Conventional Marketing Wisdom"

- **Repetitive pre-packaged e-mails.** E-recipients recognize a canned, impersonal, and generic message, and so do the spam-blockers on their computers. For details on the downside of e-mail blasts, read this no-nonsense white paper about Planned Giving spam: PlannedGiving.Com/spam.
- **Dinosaur websites.** Superfluous links, deep homepages, too much text, and libraries of unexciting planned giving "news" in special reading rooms ... If you want to confuse, bore, and alienate your prospects, these are great ways to do it.
- **Screening prospects exclusively by wealth and age.** Not only are there better criteria to predict future giving, but age-based marketing itself is a bad idea.
- **Old-fashioned planned giving newsletters.** A waste of time. People don't read them. Find out more at PlannedGiving.Com/newsletters.
- **A single mailing.** Direct-mail response marketing guru Dan Kennedy said it best: "One-step, one-hit marketing is stupid. If you are going to mail one flyer and stop, stop before you mail the one flyer." Repetition is absolutely required for effective marketing.
- **Overkill marketing.** "When in doubt, use more of the same! Wear them down until they get the message!" More newsletters, more mass e-mails, more deluxe four-color brochures, more tax articles on your website, etc. In this situation, *more is less!* All it does is make your prospects *tune you out*.
- **Promoting death.** When you market planned gifts, you are trying to persuade people to do something that most of them don't even want to think about. Even your simplest promotion ("Remember us in your will") bogs donors down in thoughts of their own mortality.

What Works: The Strategic Approach

- **Benefits-driven messaging.** An example of benefits-driven messaging would be "Your gift can benefit thousands for generations to come." See how it promotes immortality? Benefits sell the "sizzle," and the sizzle keeps your prospect focused on your mission, your vision, and on making the gift. Contrast this with "features-driven" messaging, such as "When you die, your insurance pays us." This foregrounds mortality, alienates the donor, and slows down your sales process. It's that simple.



PlannedGiving.Com/bequesttoolkit

Please refer to page 15.

- **High-impact messaging.** Your prospect is inundated with over 3000 *marketing messages a day*. They'd rather think about buying their next car, a new DVD, a Coke, or just about anything other than Planned Giving. So your message has to cut through the noise. Keep it short and sweet and benefits-driven (see above). And remember, a single punchy postcard can get your message through even if the recipient *throws it away* – something a traditional newsletter can't accomplish.
- **Multi-channel marketing.** This is really just a fancy way to say, "Reach out to your donors in different ways." *Send a balanced blend* of print and electronic messages. Use cards, letters, display ads, the tried-and-true telephone – and don't forget face-to-face visits! This strategy is simple but profoundly effective. Sticking to one monotonous marketing vector will drive your prospects to tune you out.
- **Personalized marketing.** Who is your Planned Giving "voice"? People are much more likely to respond to a message delivered by a familiar individual, someone they have a relationship with, as opposed to a stranger. *That's why when we think of Wendy's, we think of Dave Thomas*. He appeared in more than 800 advertisements for his restaurant chain, and put a recognizable, engaging human face on his (extremely successful) marketing. So select someone in your organization (a volunteer, your executive director, a beloved program officer) and consistently foreground them to tell your story.



US mail, not e-blasts, is still the preferred way to receive information.

- **73% prefer mail; 18% prefer the same content by e-mail**
- **For "Confidential Information" it's 10% (unchanged from 2004)**
- **70% prefer US mail from companies they are not doing business with.**
- **For e-mail, the preference is less than 10%. This makes new customer acquisition tough.**
- **If you take deliverability issues into account, you have a less than 1% chance your e-mail may be read.**

Simple Marketing Moves for Reliable Success

Let's focus now on the tactics to use in the Planned Giving trenches every day, techniques that have been developed, tried, and proven by real-world fundraisers in real-world situations. Put them all together and you've got a plan that gets up and works (you'll find further detail about these and other tactics in the 12-Month Planned Giving Marketing Plan pages below).

- Memorize your *planned giving one-liners*. We call these "elevator pitches." You can find one for each gift plan in our Ultimate Quick Reference Planned Giving Pocket Guide (**PlannedGiving.Com/guide**)
- Develop a donor-centric *Planned Giving website* that engages your readers and actively leads them to you for follow-up. Make sure the website is not a *passive* "reading room" like most other Planned Giving websites in the marketplace today (when was the last time you were in a reading room? Could you stay awake in one? *Reading rooms are not read.*). We suggest you stick to what you're good at – raising money – and let professionals develop your site. For industry-leading websites optimized for maximum effectiveness straight out of the box, contact **VirtualGiving.Com** (800-490-7090). They deliver world-class, donor centric, benefits-driven Planned Giving websites that *inform and inspire* and help your prospect learn more about leaving a legacy to your organization.

- Send your prospects a *personalized letter* highlighting how giving wisely benefits both donor and non-profit. Include your phone, e-mail, and web-site URL (we'll show you where to download a sample letter that you can *customize* for your institution). Mail this same letter or slightly varied versions of it three to four times a year. Why the same one? Because chances are only 10-20% of your letters will get read, and less than 5% of those who read them will remember your pitch 4 months later. Remember the value of repetition. Besides, good marketing means you maximize the number of “touches” you make in one year.
- *Select your best prospects.* Do not use wealth and age as your primary selection criteria. Your best predictor is loyalty, i.e. donors who give consistently (regardless of amount). Are you mailing to too many prospects or too few? To address this issue, consider utilizing *PGFinder*, a proprietary data mining/screening system. It achieves 91% accuracy by assessing donor loyalty. (**PlannedGiving.Com/pgfinder**)
- Traditional planned giving newsletters generate only weak response, if any. So instead *develop an engaging, effective newsletter* (how-to article available here: **PlannedGiving.Com/newsletters**). Reach out to your readership with news they can use, rather than the same old features-based gift-description articles and other boring stuff. Grow your readership with lively content. Focused, benefits-based articles with titles like “How to Establish an Endowed Scholarship With a Gift That Cost Nothing During Your Lifetime” highlight your Planned Giving program and motivate your donors.
- Other direct mail vectors include placing *smart articles in your organizational publications*, and mailing a series of *high-impact postcards* (You can download postcard copy at **PlannedGiving.Com**). These provide opportunities for multi-channel marketing and enable you to get creative with how *the medium makes your message*.
- Develop a series of *display ads* (similar to a magazine ad). Place them in your organization's publications, in commercial publications (if appropriate), and even in packets of take-away material you hand out about your program. These can be very effective. Visit **VirtualGiving.Com/ads** to learn more about finding the display ad marketing approach that will best work for your organization.



*Every fundraiser needs this book.
See last page for details.*

12-Month Planned Giving Marketing

*“I **just** received this toolkit mid-year! What do I do?”*

Don't panic! *You can start this program anytime...* even mid-year or year-end. Any time is a good time to start talking about Planned Giving.

We provide you with a detailed list of marketing resources, a month-by-month implementation timeline, and a marketing-plan-at-a-glance providing the big picture. Read through the campaign and you'll see

- It's simple.
- You can make adjustments as needed to the schedule we suggest.
- You can customize your content. All 18 resource items on the next two pages are *a la carte*. So feel free to pick and choose the material for your organization, your mission, and your campaign. Rearrange them on the timeline if you wish.

But we recommend you try to *keep the product as intact as possible*. This 12-Month Planned Giving Marketing Plan has been painstakingly designed and integrated to work for you straight out of the box. All you have to do is execute the plan. Why tamper with perfection?

“Your Path to Success”

We've done all the preparation... so you can focus on what you do best: marketing, meeting with prospects, and raising money!

IMPORTANT

- You can begin the plan in any month.
- All 18 resource items are *a la carte*, so you can pick and choose what suits you best, and modify your timeline, too. But use caution doing so.
- If you decide to use all of the suggested documents, you can purchase them at a 30% discount. Visit: **PlannedGiving.Com/plandocs**
- The Plan uses some of the resource pieces *more than once*



Resources You'll Need Over The Next Year

Note: If you decide to use all of the documents suggested on this and next page, you can purchase them at a 30% discount. Visit: PlannedGiving.Com/plandocs

These are just reference numbers and do not represent a chronological order.

①	Marketing medium: What it covers: Why: How to get it:	Solicitation letter Thanks donors for past support; <i>reviews creative ways to give</i> A constant reminder on “ways and whys of giving” is a must PlannedGiving.Com/2000
②	Marketing medium: What it covers: Why: How to get it:	Postcard General/most popular planned giving options A back-up quick-read summary mailer of the letter in ① PlannedGiving.Com/6000
③	Marketing medium: What it covers: Why: How to get it:	Solicitation letter Bequests Revisiting a point made in ① — <i>A gift that costs nothing during lifetime</i> PlannedGiving.Com/2002
④	Marketing medium: What it covers: Why: How to get it:	Testimonial worksheet (free) Helps you gather donor testimonials/stories Donor testimonials motivate others to give (<i>and create 2nd time gifts!</i>) PlannedGiving.Com/worksheet (PDF)
⑤	Marketing medium: What it covers: Why: How to get it:	Testimonials/Donor stories (pre-written) If you want to facilitate ④ simply purchase <i>pre-written stories</i> and adapt A constant reminder on “ways and whys of giving” is a must PlannedGiving.Com/donorstories (<i>you will have many to choose from</i>)
⑥	Marketing medium: What it covers: Why: How to get it:	Article/column in any or all of the publications your institution mails out Bequests; reminds them of your website A good way to back-up your direct mail PlannedGiving.Com/7002
⑦	Marketing medium: What it covers: Why: How to get it:	Newsletter Bequests Another medium for your marketing. <i>Make sure it includes testimonials</i> ⑤ PlannedGiving.Com/1001
⑧	Marketing medium: What it covers: Why: How to get it:	Postcard Life Insurance (<i>easy to give</i>) A back-up quick-read summary mailer of the letter in ① PlannedGiving.Com/6004
⑨	Marketing medium: What it covers: Why: How to get it:	Postcard Bequests (<i>easy to make and do not affect cashflow</i>) A back-up quick-read summary mailer of the letter ① and postcard ② PlannedGiving.Com/6005
⑩	Marketing medium: What it covers: Why: How to get it:	Postcard Retirement Plans (<i>easy to make and do not affect cashflow</i>) A back-up quick-read summary mailer of the letter in ① and postcard ② PlannedGiving.Com/6007

⑪*	Marketing medium: What it covers: Why: How to get it:	Postcard Year-end giving This is a must for year-end when people are looking for deductions PlannedGiving.Com/6001
⑫*	Marketing medium: What it covers: Why: How to get it:	Postcard Year-end giving even if some securities have dipped; has option for CGA Use this card in addition to ⑪ if the economy poses challenges PlannedGiving.Com/6002
⑬	Marketing medium: What it covers: Why: How to get it:	Display ad in your publication(s) General planned giving A sustainable back-up for continuous coverage PlannedGiving.Com/5002
⑭*	Marketing medium: What it covers: Why: How to get it:	Solicitation letter General planned giving focusing on year-end giving in a “tough year” A sustainable back-up for continuous coverage PlannedGiving.Com/2005
⑮	Marketing medium: What it covers: Why: How to get it:	Article/Column Bequests; reminds them of your website A sustainable back-up for continuous coverage PlannedGiving.Com/1006
⑯	Marketing medium: What it covers: Why: How to get it:	Postcard Bequests (for the faithful older donors) A sustainable back-up for continuous coverage PlannedGiving.Com/6006
⑰	Marketing medium: What it covers: Why: How to get it:	Newsletter Bequests Another medium for your marketing. <i>Make sure it includes testimonials</i> ⑤ PlannedGiving.Com/3012
⑱	Marketing medium: What it covers: Why: How to get it:	Article/column in any or all of the publications your institution mails out Planned giving general; reminds them of your website A good way to back-up your direct mail PlannedGiving.Com/1018

Note: If you decide to use all of the documents suggested above, you can purchase them at a 30% discount. Visit: **PlannedGiving.Com/plandocs**

* For year-end giving



**Your chronological, month-by-month,
step-by-step implementation**

Month-by-Month Implementation

<p>Month</p> <p>1</p>	<ul style="list-style-type: none"> • Introduce (or reintroduce) Planned Giving with a personalized letter ①. Do this three times a year. Month 1 may be January, July, or any month you choose. <i>The important thing is to get started.</i> <p>Some basic rules to follow:</p> <ul style="list-style-type: none"> (a) Send it first-class mail (b) Use a live stamp (c) Hand-address the envelopes — do not use labels or window envelopes. <ul style="list-style-type: none"> • Develop a Basic Level Planned Giving Website (\$1,495/yr) with VirtualGiving.Com 800-490-7090
<p>Month</p> <p>2</p>	<ul style="list-style-type: none"> • Send out a Planned Giving postcard ⑨ on bequests (<i>emphasize that it's the gift that costs nothing during lifetime</i>). • Develop a display ad ⑬ (like the display ads you see in magazines) covering planned giving in general for any or all of the publications that your institution sends out (monthly newsletter, annual report, bulletin, etc.). Use this ad throughout the year in your publications. <p>Here are sample layouts you can use: PlannedGiving.Com/displayads</p>
<p>Month</p> <p>3</p>	<ul style="list-style-type: none"> • Make your organization's newsletter or magazine more useful and donor-friendly by including a column or article ⑥ on bequests. • Send out an informative solicitation letter ③ on bequests.

Month-by-Month Implementation

<p>Month 4</p>	<ul style="list-style-type: none">• Mail a slightly varied version of the same letter ① you mailed back in Month 1. No need to re-write it. <i>Your only cost is postage and letterhead.</i>• Approach your donors for testimonials. Need a testimonial worksheet you can download for free? See ④.• If you do not have the time, or if you are having difficulty gathering donor stories and need pre-written stories to start with, see ⑤.
<p>Month 5</p>	<ul style="list-style-type: none">• If you have donors ready to be profiled, put together a newsletter showcasing them (emphasize vision and mission) with copy on bequests. Here is a powerful newsletter article ⑦ on bequests, <i>the gift that costs nothing during your lifetime.</i>• Send a “general” postcard ② on the easiest ways to give. Covers bequests, appreciated securities, IRAs, and life income gifts. If you don’t offer one of these gift types, just delete it from the card.
<p>Month 6</p>	<ul style="list-style-type: none">• Make your organization’s newsletter or magazine more useful and donor-friendly by including a column or article ⑮ on bequests. (You may publish this for a different month based on the schedule of your publication.)• Postcard ⑧ on life insurance: Encourage your prospects to give you paid-up life insurance policies whose coverage they no longer need. Get them thinking about how using non-cash assets can make it easier for them to give more. <i>Promote this as a gift that does not affect their cash flow.</i>

Month-by-Month Implementation

<p>Month</p> <p>7</p>	<ul style="list-style-type: none">• Postcard ⑨ on bequests: Targets your faithful donors (the ones who have given almost every year, regardless of amount) and tells them how their involvement with your organization can continue beyond their lifetimes. The card highlights the simplicity and satisfaction of endowing annual giving through a bequest. The copy is clear and persuasive.
<p>Month</p> <p>8</p>	<ul style="list-style-type: none">• Postcard ⑩ on retirement plans: Strong, persuasive copy that contrasts the tax risks of passing their retirement plan to heirs, with the tax savings of transferring it to you. Readers are led to you for follow-up information.• Mail a letter ① very similar to the one you mailed back in Month 1. No need to re-write it from scratch.
<p>Month</p> <p>9</p>	<ul style="list-style-type: none">• Make your organization's newsletter or magazine more useful and donor-friendly by including a column or article ⑱ on bequests. (This may appear in a different month based on the schedule of your publication.) <hr/> <p><u>IF IT IS NEAR YEAR-END:</u></p> <ul style="list-style-type: none">• Your first postcard ⑪ on year-end giving (there's another one to follow next month): Use the approach of tax-time to motivate your prospects to give. Card describes the benefits of lowering taxes through a charitable deduction and of using the appreciated stock to leverage a larger gift. Copy also recommends that readers update their estate plans, and closes with a reminder of the ease of making a gift that costs nothing in lifetime.• If it has been a tough year, send out this letter ⑭ at year-end too: <i>Year-End Giving in a Tough Year</i>.

Month-by-Month Implementation

<p>Month 10</p>	<ul style="list-style-type: none">• Solicitation letter ③ on bequests. <hr/> <p>IF IT IS NEAR YEAR-END:</p> <hr/> <ul style="list-style-type: none">• Your second postcard ⑫ on year-end giving: At year-end, your prospects are reviewing their portfolio's performance, deciding which securities to sell and which to hold on to. This postcard plays off that activity and shows prospects the benefits of using securities to make a gift — even securities that have declined in value this year. Copy highlights giving securities outright and using them to fund a gift annuity. Copy will appeal to both casual and experienced investors.
<p>Month 11</p>	<ul style="list-style-type: none">• Re-introduce Planned Giving with the same letter ① you sent out back in the first month of this campaign. <hr/> <p>IF IT IS NEAR YEAR-END:</p> <hr/> <ul style="list-style-type: none">• If it's close to year-end, use solicitation letter ⑭, <i>"Year-End Giving in a Tough Year"</i>.
<p>Month 12</p>	<ul style="list-style-type: none">• Use the same postcard ⑨ you sent out in Months 2 and 7. Make sure you place donor testimonials ⑤ on the card.• Or send out another newsletter ⑰ on bequests. Make sure to place donor testimonials in the newsletter. Donor stories motivate others to give and generate second-time gifts. If you need testimonial copy ⑤, you can download then customize it.

Remember: If you decide to use all of the documents above, you can purchase them at a 30% discount.
Visit: PlannedGiving.Com/plandocs

Marketing Plan At-A-Glance

Use this chart for an organized overview of your resource scheduling. If you want to add or change any of your topics or tools, visit: store.PlannedGiving.Com (do not use www before the address)

Month	Postcard	Letter	Testimonial	Newsletter	Article	Display Ad	Website
1		①					Develop Website →
2	⑨					⑬	
3		③			⑥		
4		①	④ ⑤				
5	②			⑦			
6	⑧				⑮		
7	⑨						
8	⑩	①					
9	② or ⑪	⑭			⑱		
10	③ ⑫	③					
11		① or ⑭					
12	⑨		④ ⑤	⑰			

Run the display ad in your publication(s) as often as possible.

Online all year. Your print pieces will drive traffic to your site.

Contact VirtualGiving.Com: 800-490-7090
www.VirtualGiving.Com

REMEMBER

- You can begin the Plan in any month.
- Products ⑪, ⑫ and ⑭ are specifically written to be used during October through December
- All 18 resource items are *a la carte*, so you can pick and choose what suits you best, and modify your time-line. But use caution doing so.
- If you decide to use all of the suggested documents, you can purchase them at a 30% discount. Visit: PlannedGiving.Com/plandocs
- The Plan uses some of the resource pieces *more than once*.

Get Your Board ... on Board



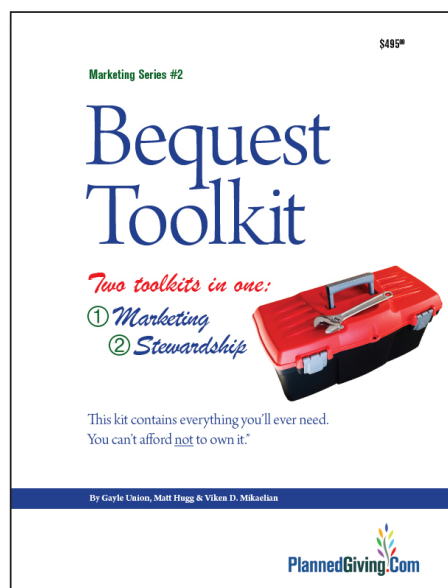
A compelling PowerPoint presentation to convince your board of the importance of Planned Giving and endowment. Whether you are starting a new program or strengthening an existing one, it's always important to get your board... on board.

And this is just the tool you need!

It's designed to be used with board members or any other group of volunteers (with a little editing, it could also be used with senior leadership). It can help them understand why Planned Giving should be an integral part of their fundraising operations, or confirm for them that their decision to begin such a program was correct.

Essentially, it makes the case for Planned Giving. For a sample of some of the points covered, visit:

PlannedGiving.Com/board



Most planned gifts closed this year will be bequests.

So why not power-up your marketing of the gift your donors like best? Get started today with this ready-to-go Bequest Toolkit. Here are all the materials you'll need, from start to finish, for a successful bequest campaign.

And, it's two toolkits in one — like buying one and getting one free!

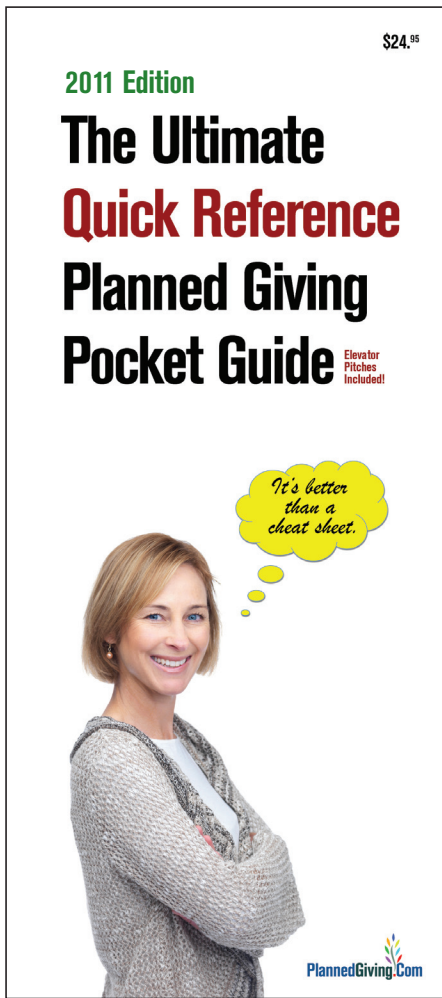
1. The *marketing toolkit* helps you promote bequests.
2. The *stewardship toolkit* helps you acknowledge and steward your newly discovered bequest donors.

Why waste months planning, writing, and editing all this material yourself? Start saving time, money, and back-office hassle today with this Bequest Toolkit. It makes your life and your job easier.

You need to be talking to your donors about bequests right now, not months from now. With this toolkit you can do it.

Everything you'll ever need... and it's two toolkits in one.

PlannedGiving.Com/bequesttoolkit



The must-have tool for raising major or planned gifts! For yourself, your staff, and the board. For more satisfied donors and better financial results.

This is the *insider's guide* to what planned gifts can do for your donors and your organization. Not another ways-to-give brochure — it's a "why's of giving" guide that helps you understand and articulate the pros and cons of different gift planning options for yourself and your prospects.

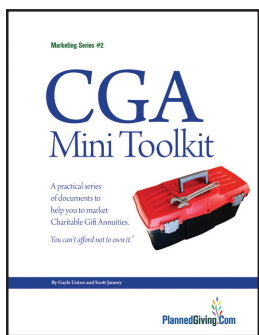
- Written in plain English
- Intuitive organization: **Gifts Anyone Can Afford, Gifts That Pay Income, Gifts That Protect Assets**
- Concise gift reviews with features summary plus benefits and challenges to both the donor and your organization
- Informative gift illustrations that enable understanding at-a-glance
- Organized and written by four seasoned Planned Giving experts
- Includes Elevator Pitches for every gift
- Handy 4x9 inch format fits pocket, purse, or bag
- Wire-bound so it lies flat on your desk
- Attractive, four-color design
- \$24.95 per copy price with quantity discounts available online

Keep it open beside you the next time you phone a potential donor who has requested gift information. **Carry it** on your next road trip. It will keep you up to speed on what gift plans work for which prospects, so you'll be ready to move to Plan B if your first recommendation doesn't fit their needs.

The Planned Giving Pocket Guide equips you with essential knowledge you need to open conversations about the gifts that make a significant difference to your organization and your career.

Order online. It's fast and easy. And remember to order copies for your volunteers and board. They'll appreciate it:
PlannedGiving.Com/guide

CGA Mini Toolkit



Ready-to-go, customizable content to help you market Charitable Gift Annuities.

Why waste time deliberating over which pieces to send and what order to mail them in? This CGA Combo Pack takes the guesswork out of the process so you achieve maximum results.

Consisting of six attention-grabbing CGA marketing pieces, the Combo Pack will help you raise substantial money to advance your organization's mission through Gift Annuities.

PlannedGiving.Com/cgamini

Will Kit



This critical gift planning kit is *also* the perfect networking kit! Distribute its customizable promotional handout contents to attorneys and financial advisors, as well as your board and legacy society members.

PlannedGiving.Com/willkit

 800-873-9203



success@PlannedGiving.Com