

# PLANNED GIVING ESSENTIALS



The largest wealth transfer in the history of the U.S. is taking place right now. Organizations that are not proactively pursuing planned gifts are missing out on one of the greatest opportunities to dramatically change the landscape of their fundraising program. Planned Gifts (gifts from assets) are an afterthought for too many organizations yet 80-90% of your donor's wealth is in their assets, not their wallets or checkbooks. Additionally, your donors want options. Planned gifts enable them to give more and have a bigger impact on the people you serve.

If your organization has the potential but no plan in place to pursue planned gifts in a confident and intentional way, PLANNED GIVING ESSENTIALS is especially designed for you.

## What is PLANNED GIVING ESSENTIALS?

**Infrastructure:** You will establish goals for planned giving with a system for gift acceptance, gift counting and recognition policies. You will also have systematized tracking and reporting to stay informed of gift opportunities and expectancies from your portfolio.

**Prospect Strategy and Execution:** We will help you to develop a clear plan to qualify a larger pool of gift planning prospects leading to more meaningful conversations and documented intentions.

**Marketing Plan:** Using our template, you will develop a donor-centered marketing plan that brands your Legacy Society, creates materials for a variety of communication channels, and delivers messages that encourage donors to take action.

**Stewardship Plan:** You will develop a strategy for onboarding new planned giving donors and cultivating current Legacy Society members to document their intentions, as well as increase their outright and deferred giving.

**Informing Your Board:** You will have a plan to connect with each of your board members personally to inspire them to support this initiative and make a planned gift commitment as well.

**Training Your Team:** Your team will develop the right mindset, behavior and skillsets to make planned giving a part of their everyday interactions with all donors.

**PLANNED GIVING ESSENTIALS** is a 9-month program with monthly meetings to complete each module. We will walk you through the process each step of the way. Our consultants are experienced gift planning professionals who still work with donors. By the end of the program, you will have a system in place to substantially expand your fundraising revenue and ensure that your non-profit organization will thrive for generations to come.

**Contact us today for a free consultation.**

**Joe Tumolo**

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