

# Multi-Channel Outreach to Maximize Your Legacy Gifts



**Anthony R. Alonso**  
**President**

**[anthony@catapultfr.com](mailto:anthony@catapultfr.com)**

**[www.catapultfr.com](http://www.catapultfr.com)**

**702-508-0101**





**Giving  
USA™**

A public service initiative  
of The Giving Institute

# \$471.44 billion

In 2020, Americans gave \$471.44 billion to charity, a 5.1% increase over 2019.

## Where did the generosity come from?

### Contributions by source

By percentage of the total

#### Giving by Individuals

\$324.10 billion

**69%** ↑2.2%

increased 2.2 percent over 2019.

#### Giving by Foundations

\$88.55 billion

**19%** ↑17.0%

increased 17.0 percent over 2019.

#### Giving by Bequest

\$41.91 billion

**9%** ↑10.3%

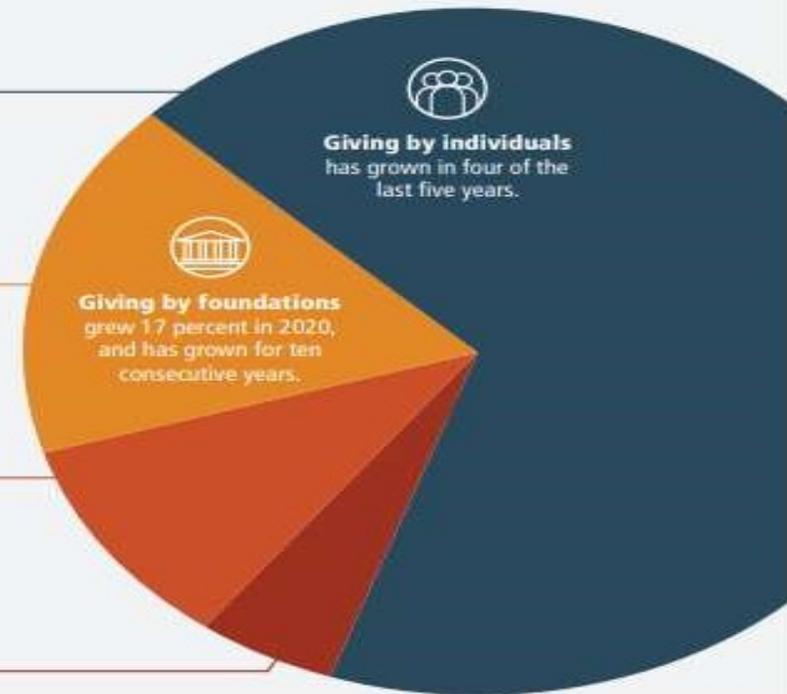
increased 10.3 percent over 2019.

#### Giving by Corporations

\$16.88 billion

**4%** ↓6.1%

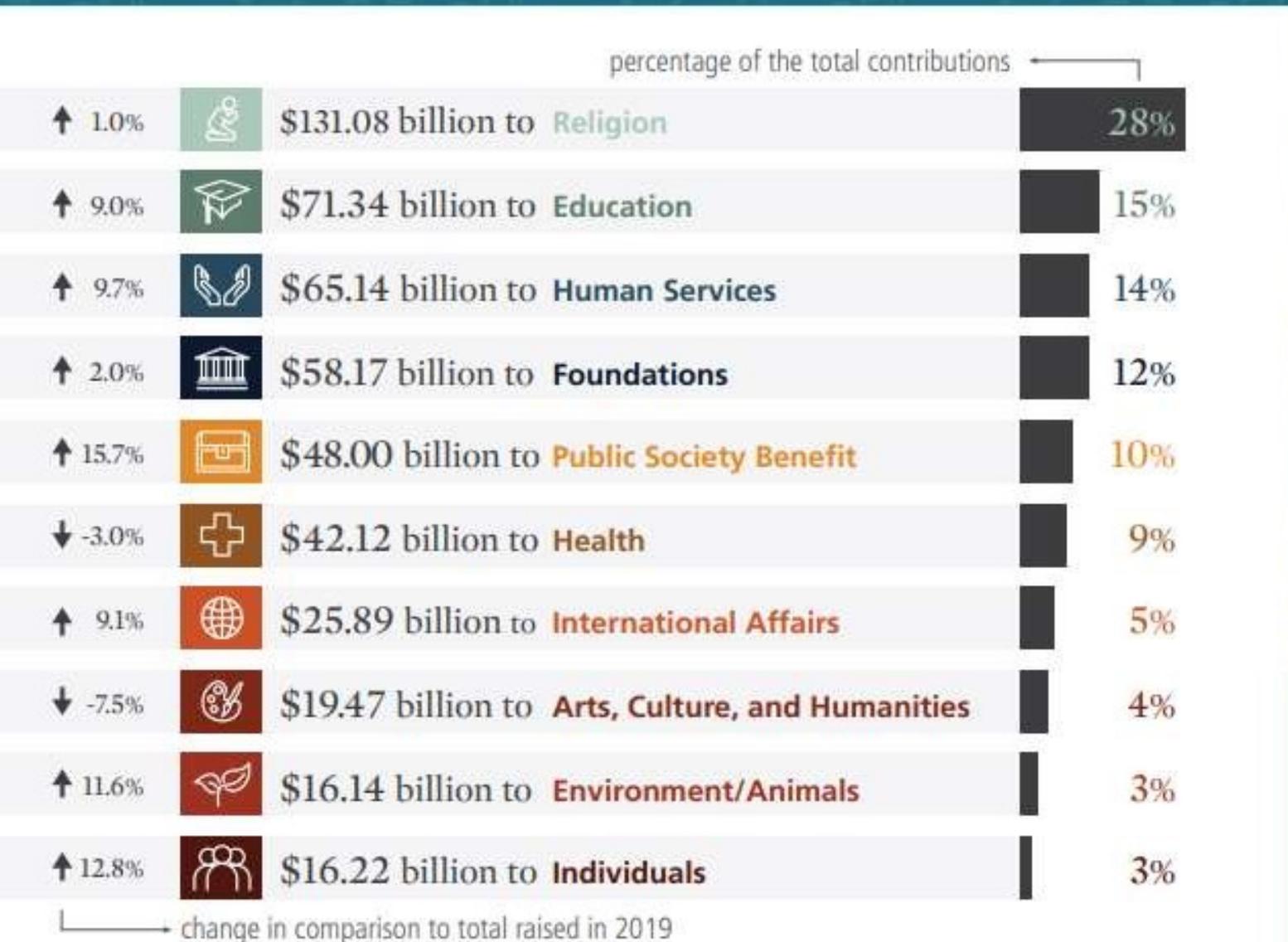
declined 6.1 percent from 2019.



\*All figures on this infographic are reported in current dollars unless otherwise noted.

# Where did the charitable dollars go?

## Contributions by destination





Giving to public-society benefit organizations increased 15.7 percent in 2020, marking the eleventh consecutive year of growth for this subsector.

# Planned Giving During the Pandemic

- Right now, many people are living the “death becomes real” experience. Consequently, there is a major upsurge in Will document completions – particularly online. Some sites are reporting greater than 100 percent week-over-week increases in completed documents.
- The Remember a Charity website, which promotes legacy giving, has experienced twice as many people visiting its “Making A Will” page as would do so normally.
- People are planning like never before because they seek to take care of their families, usually the first priority of those doing estate planning even in the best of times. The challenge for charities is that we need to be at the top of their minds when people are ready to make their plans. It’s definitely the best time for legacy fundraising.
- In the pre-COVID-19 surveys, 31.89 percent of respondents expressed some level of interest in pursuing legacy giving. Among the mid-COVID-19 respondents, the percentage was 34.59 percent.

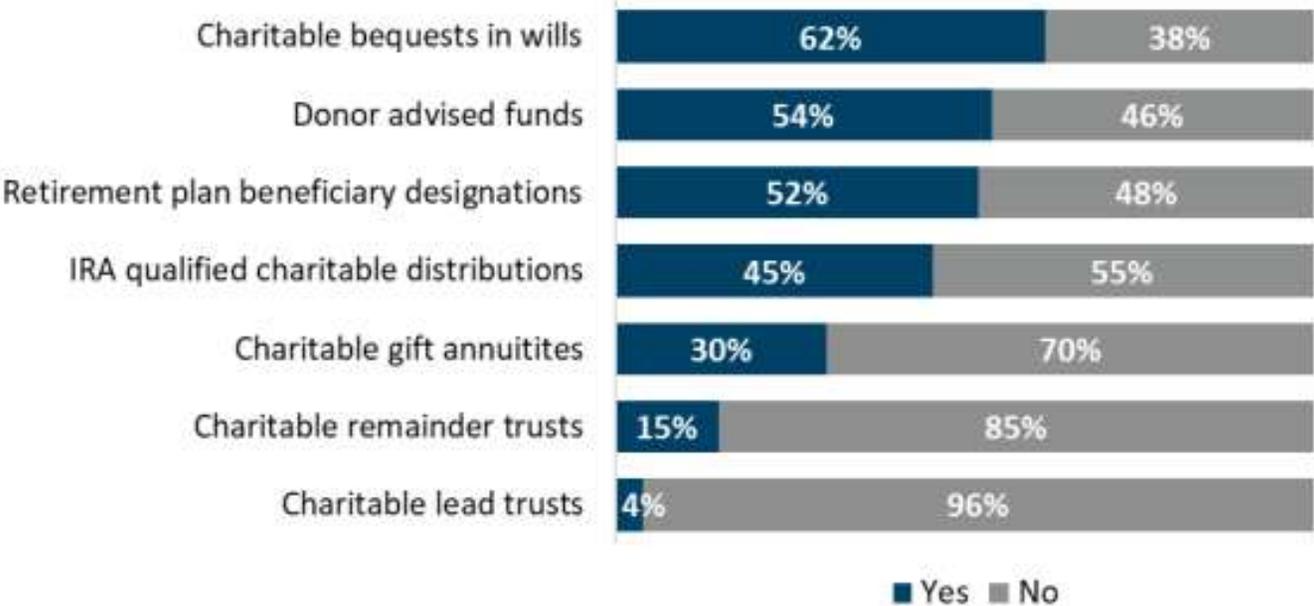
1) Source: Legacy Fundraising: The Best of Times or the Worst of Times?

Russell N. James III, JD, PhD, CFP® and Michael J. Rosen

2) Market Watch Survey

# Planned Giving During the Pandemic

Have you experienced increased interest in any of the following gift planning methods? (80)



Source: Survey by: National Association of Gift Planners  
Marts and Lundy

# PLANNED GIVING IS FOR EVERYONE

It's not just for the old and wealthy. Almost everyone has the ability to make a bequest, even if it's just a small percentage of their estate.

Bequests are widely considered the major gift of the middle class.



# PLANNED GIVING IS FOR EVERYONE

- 33% of Americans are willing to consider a charitable bequest
- The average age someone makes their first bequest is between 40–50 years old
- Those without children are far more likely to make a planned gift
- Bequests are the most common form of planned gifts to charities (90%). They're also the easiest!

Sources: Giving USA 2017, Michael Rosen's Best Selling Book: Donor-Centered Planned Gift Marketing, Indiana University and Paul Schervish



# PLANNED GIVING MOTIVATIONS

Why do people make planned gifts?

Tax avoidance is NOT the biggest motivation to make a bequest.

Of survey respondents citing reasons for providing a bequest:

- 97% desire to support the charity
- 35% desire to reduce taxes

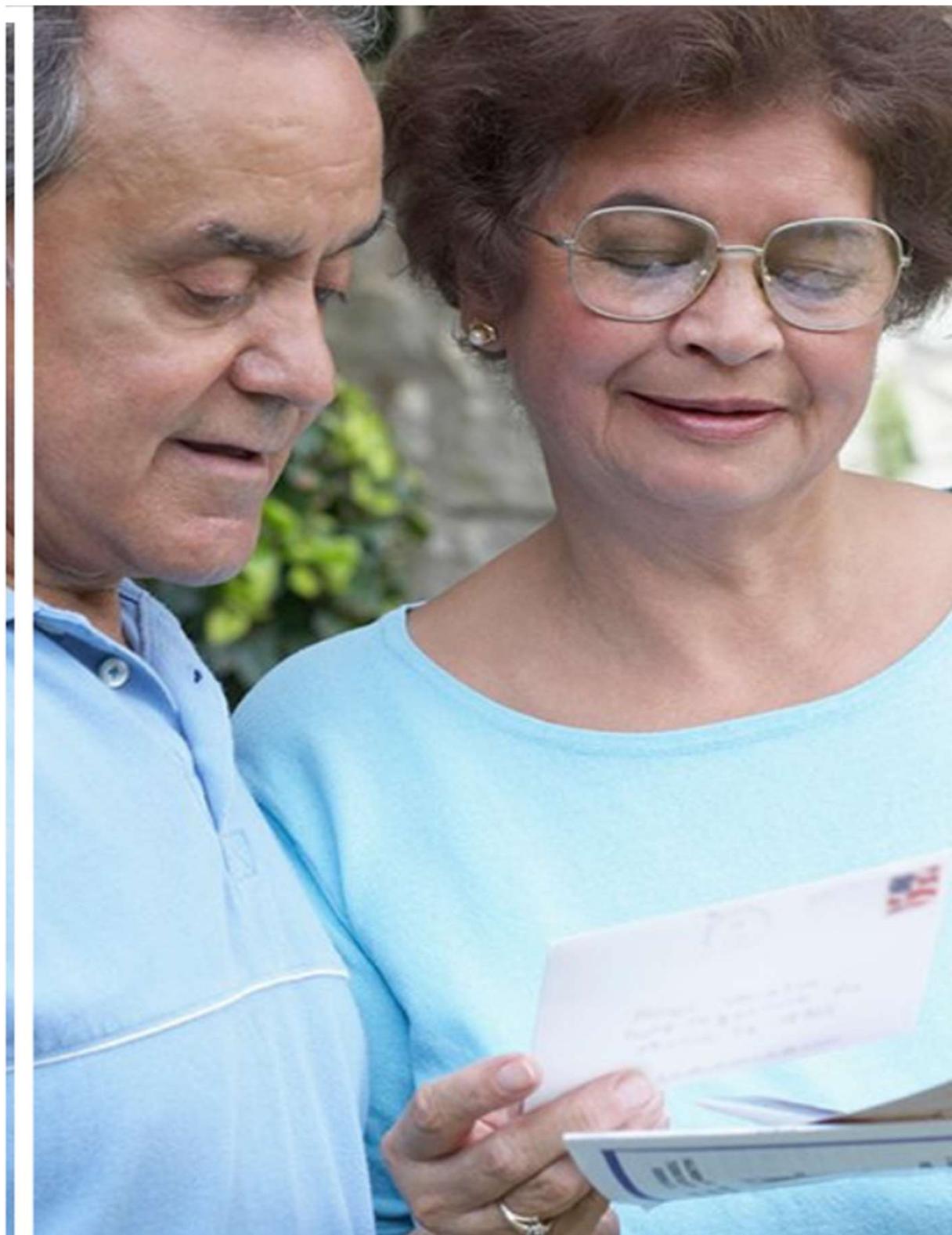
**It's because people love  
your organization and mission!**

# YOU HAVE TO ASK THEM!

Donors love your organization and want to support, but you have to ask!

In a national survey among those over the age of 30, only 22% say they have been asked for a planned gift.

**Telephone outreach helps you ask when you can't be there to ask!**



# **PLANNED GIVING TELEPHONE OUTREACH PROGRAMS**

**Reach thousands of  
prospects  
in a matter of months to  
identify interest  
and close planned  
gifts!**



Loyal-High Net Worth

Loyal-Modest Means

Everyone Else

1/2  
%



VS

10-15  
%



# Profile of a Planned Giving Donor

- > **Loyal donor who gives to an organization on a consistent basis**
- > **41% of planned giving donors have given to the Annual Fund for ten or more years**
- > **77% of planned giving donors have given to the Annual Fund at least fifteen times**
- > **Someone who truly believes in the mission of the organization and wants to see the charity succeed well into the future**
- > **Wealth is not a factor – loyalty is the key (only 6% of planned giving donors are considered wealthy)**

# 3 QUESTIONS TO SEE IF A CALLING PROGRAM IS RIGHT FOR YOU

- 1) DO WE HAVE ENOUGH DONORS WHO ARE LOYAL TO OUR MISSION?
- 2) CAN OUR DONORS BE REACHED?
- 3) DO WE HAVE THE ABILITY TO FOLLOW UP?

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# GOALS OF A CALLING PROGRAM

- 1** Thank loyal donors
- 2** Identify interest
- 3** Explore gift planning options with gift planning specialists
- 4** Confirm and quantify planned gifts



# STEPS FOR A SUCCESSFUL PROGRAM

- ➊ Prospect screening & list review
- ➋ Social media messaging
- ➌ Pre-call material
- ➍ Qualification calls
- ➎ Gift planning calls
- ➏ Confirmation
- ➐ Recognition
- ➑ Reporting



# Case Study

Northeast University



# RESULTS

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**1,000 PROSPECTS CALLED**

518 WERE REACHED AND WITH WHOM WE HAD

**A CONVERSATION**

OF THESE, **28% EXPRESSED** A CURRENT INTEREST

IN PLANNED GIVING OR HAD ALREADY COMPLETED

**A PLANNED GIFT**

- 
- > **Tier 2 callers followed up with each of these individuals to secure and/or quantify the gift.**
  - > **An additional 70 prospects expressed interest in exploring options for a planned gift in the future. The client will follow up with these prospects in the future.**
  - > **Secured 41 planned gifts, totaling \$2,166,000, potential of an additional \$90,000 from prospects with short-term planned giving/outright interest.**
  - > **Potential \$180,000 in long-term planned giving interest, plus a potential \$350,000 from prospects with possible future interest.**
  - > **Potential \$92,500 from prospects who would like to continue to receive planned giving marketing materials.**

# The bottom line

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**Total confirmed gifts:**

**\$2,166,000\***

**Total potential gifts:**

**\$712,500**

\*Approximately 75% of these confirmed gifts are new gift commitments.

# INVESTMENT

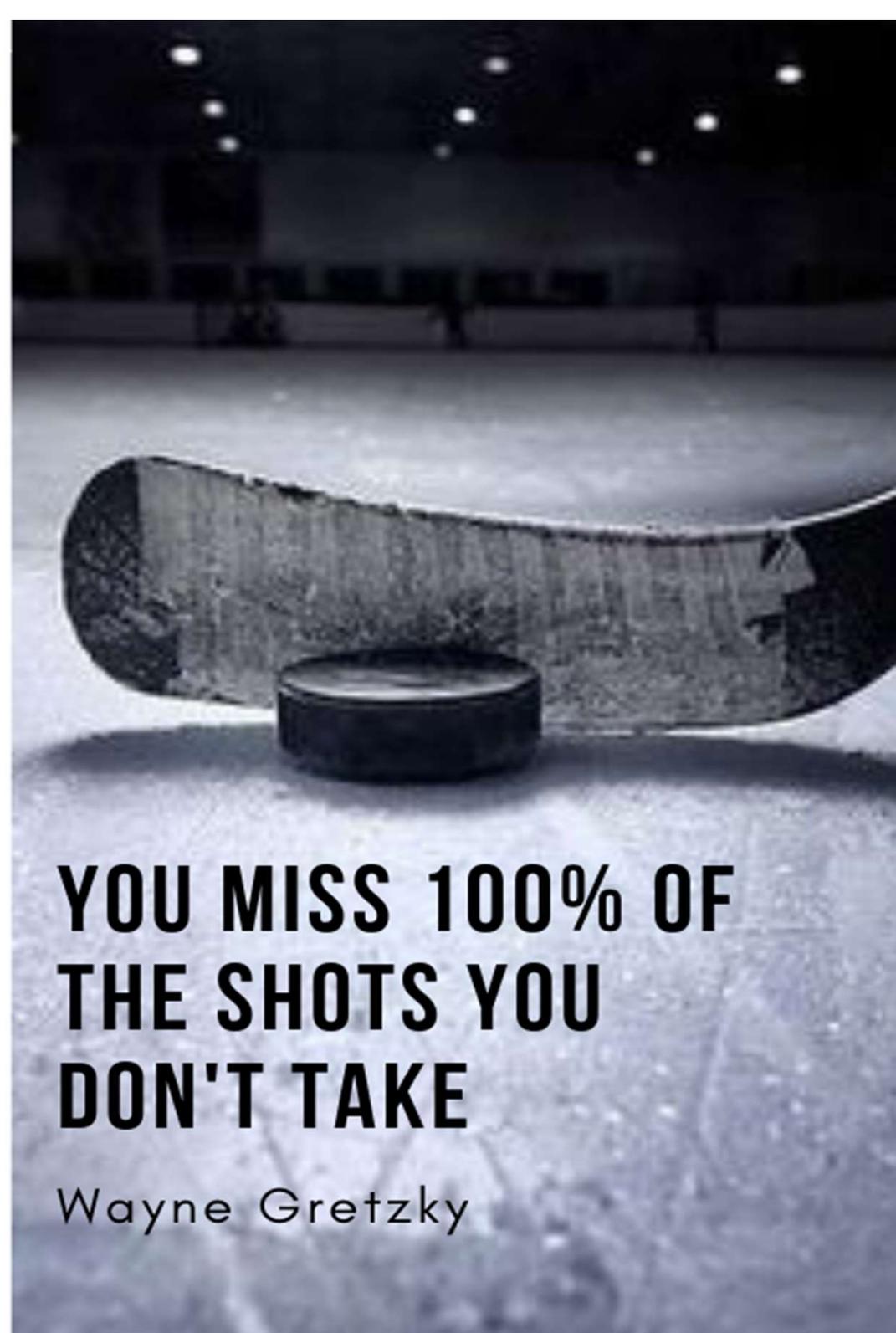
*How much should you spend on planned giving marketing?*

It depends on...

goals, target market size & budget

Start by planting a seed and gauging results

**Doing something is better than doing nothing!**



**YOU MISS 100% OF  
THE SHOTS YOU  
DON'T TAKE**

Wayne Gretzky



THOUSANDS OF LOYAL DONORS ARE  
JUST **WAITING** FOR YOU TO ASK.

# Presenter:



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President**

[anthonya@catapultfr.com](mailto:anthonya@catapultfr.com)  
702-508-0101

**[www.catapultfr.com](http://www.catapultfr.com)**

Henderson, NV – Dallas, TX – Bemus Point, NY – Wayne, NJ



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