



The Planned Giving Course
Introduction and Course Context

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Welcome and Housekeeping

- Thank you for registering for the 2020 Virtual Planned Giving Course presented by the PGCGP
- Zoom Video and Audio
- Chat Box Feature
- Q&A at the end of each session/Day 1 & 2 Review
- Presenter contact information will be available.

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Course Objective

To master the basics of planned giving and increase your comfort level with the various tools and techniques for planned gifts.

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What Will We Learn?

- Relevant tax and estate planning laws
- Planned giving program management and best practices
- Marketing planned giving and donor engagement
- Real life donor scenarios and case studies

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Why is Planned Giving Important?

- Planned gifts are among the largest gifts a nonprofit will receive, often 200 to 300 times the size of annual gifts.
- Philanthropic Competition: If you don't have a planned giving strategy you're losing out on funding. Another organization is getting funding that could have been yours.
- Great Transfer of Wealth: Financial experts are predicting that, over the next five decades or so, between \$40 trillion and \$140 trillion will be passed from one generation to the next.
- Ensures a pipeline of long-term funding and a revenue stream that can support an organization during an unexpected economic downturn.

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Myths

- Myth 1: Planned giving is very difficult.
- Myth 2: One needs to be a planned giving expert to be involved in gift planning.
- Myth 3: All planned gifts are deferred gifts.
- Myth 4: Planned gift marketing should be passive.

Michael Rosen CFRE <http://www.thefundraisingauthority.com/planned-giving/planned-giving-myths/>

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Who are Planned Giving Donors?

1. Consistent/loyal donors (5+yrs, 8-10yrs, etc...)
2. Highly engaged volunteers (board members)
3. Individuals who trust your organization
4. Grateful alums, clients, patients
5. Unmarried individuals and childless couples
6. Older individuals (age 70 ½)—but not exclusively

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Common Giving Vehicles

1. 90% bequests/equivalents (Beneficiary Designations, 401K, etc)
2. IRA Charitable Rollover/Stock Transfers
3. Donor-advised funds are the fastest growing charitable giving vehicle
4. Life income gifts (CGA's, Trusts)

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Why A Donor Would Consider a Planned Gift

1. Philanthropic impact
2. Efficiency of giving
3. Income, tax, or estate planning
4. Pass on the value of philanthropy
5. Leave a legacy

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An Organization's Case for Planned Gifts

- 1. Long-term philanthropic revenue
- 2. Way to engage donors today
- 3. Avoid leaving gifts on the table
- 4. Useful tool for building donor loyalty

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Thank You!

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