

Establish, Grow, or Reignite Planned Giving in Your Organization!

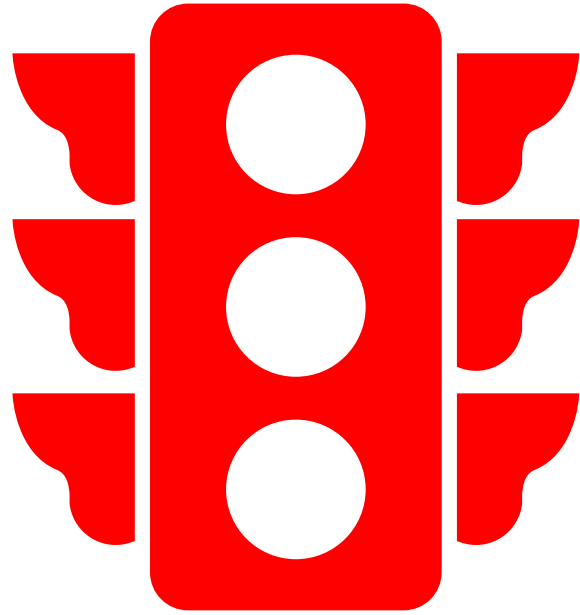
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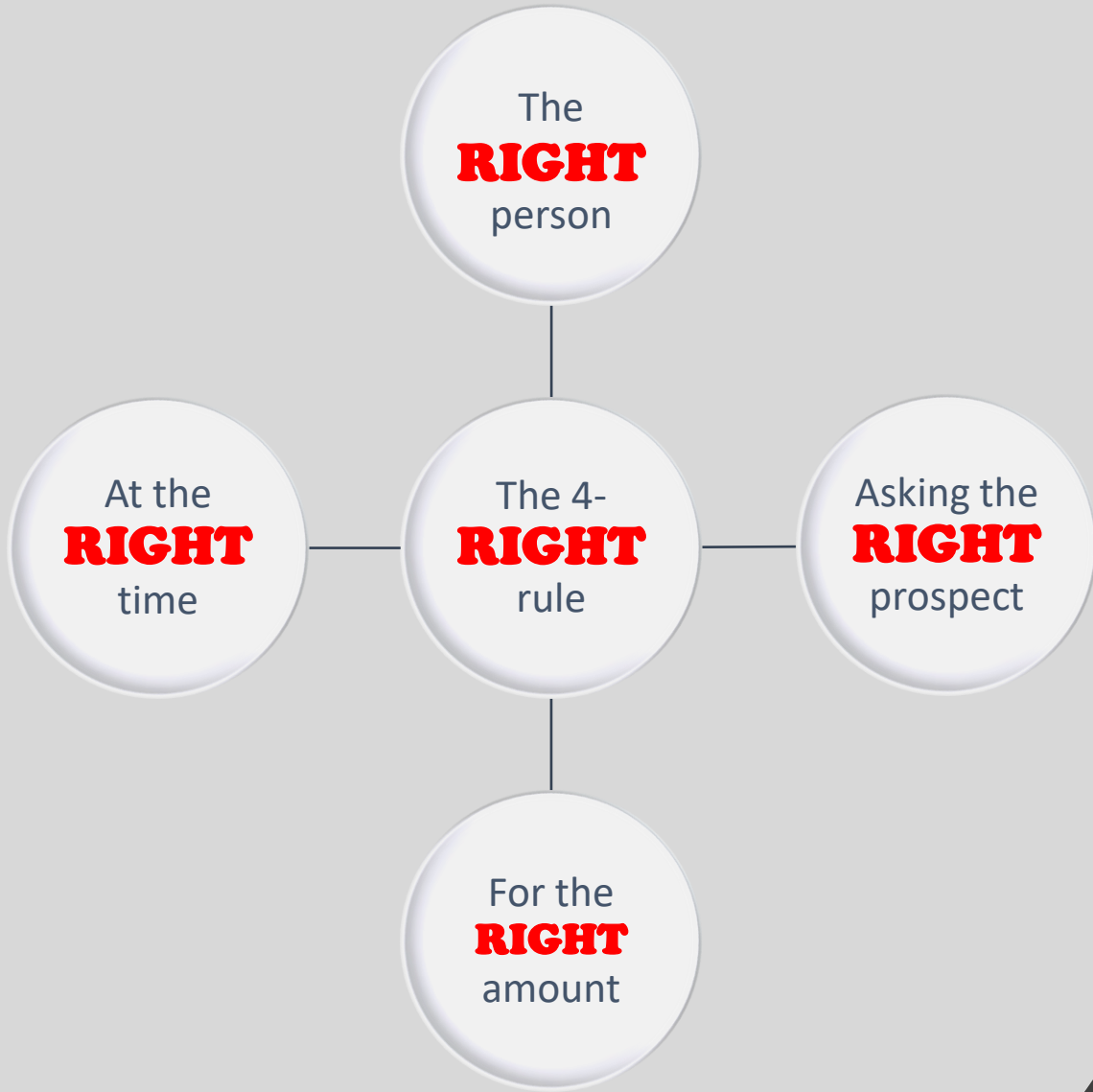
Today's Top 5

- **Recognizing Intent**
- **Donor Communication**
- **Indicators of Planned Giving Capacity**
- **Internal Infrastructure**
- **After-life Gift Processing**



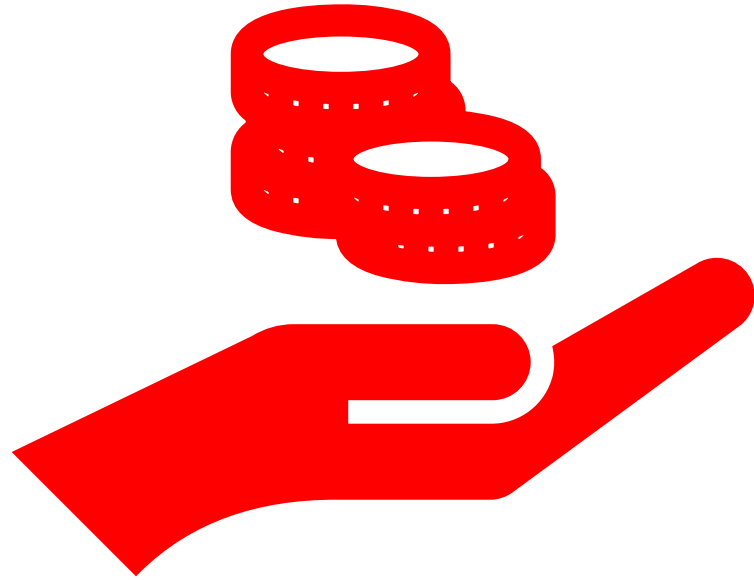
Is Your Organization Ready?

- **Mission / Vision / Values**
- **Case**
- **History**
- **Internal Support**
- **External Relationships**
- **Donor File Size**
- **Ethical Behavior in Philanthropy**



The 4-**RIGHT** Rule

How to Identify Planned Giving Donor Prospects



- **Identification:**
 - Age
 - Affinity
 - Loyalty
- Giving History
- Family Members
- Pets
- Wealth Capacity Ratings

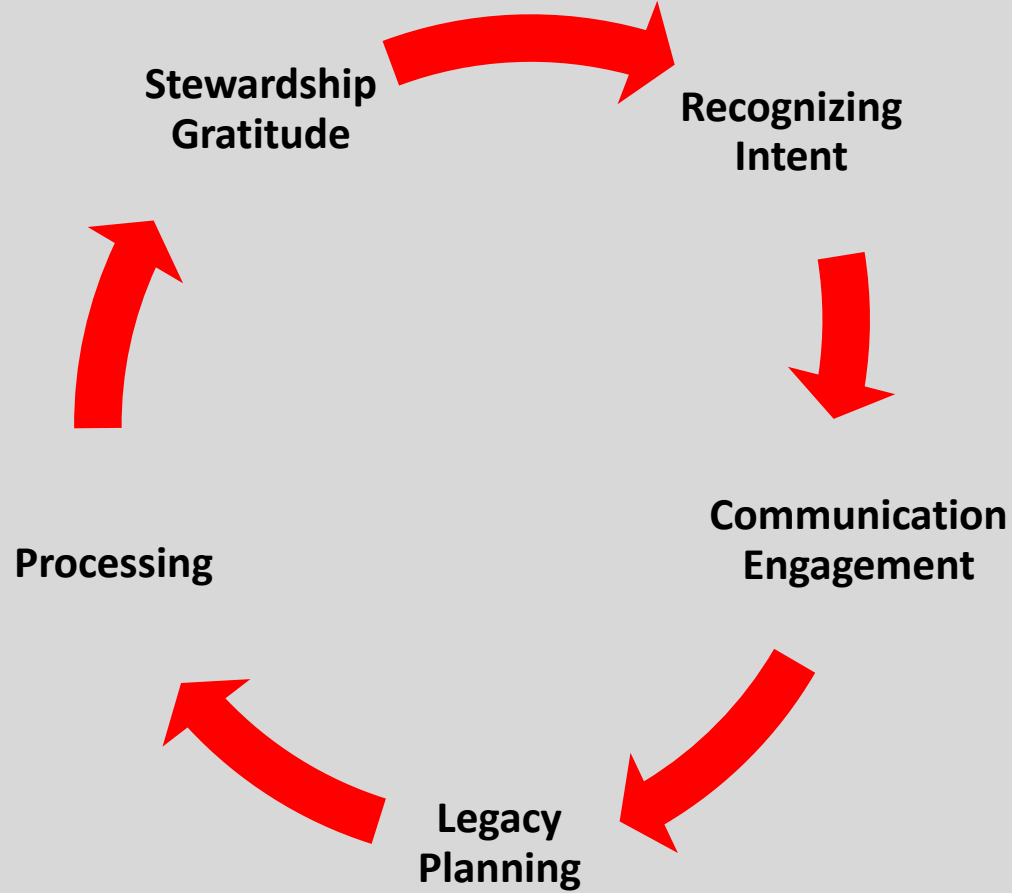


How to Build the Pipeline? – *Legacy Call*

- Thank loyal donors
- Identify interest
- Explore gift planning options
- Build Trust
- Confirm & quantify planned gifts

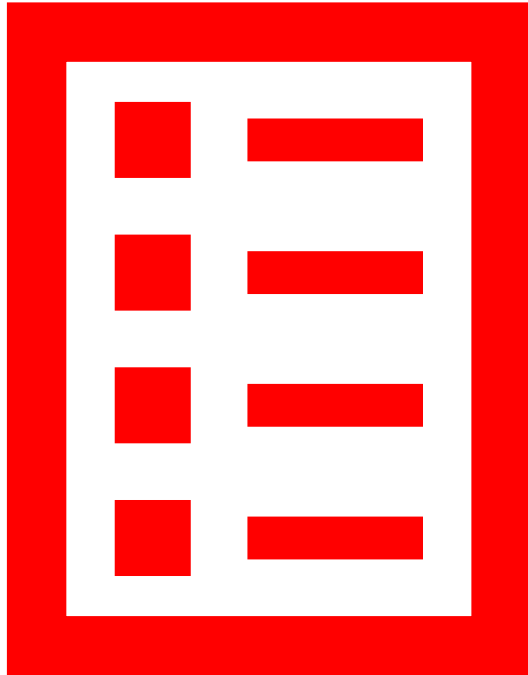


Donor Communications



Planned Giving Donor Cycle

Getting Started



- **Planned Giving Solicitation Kit**
- **Traditional Components**
 - Folder/Jacket: Branded accordingly
 - Case for Support with tailored Case Statement
 - About Us History and Timeline
 - Organization Leadership: Staff, Board, Advisors
 - Programs
 - FAQ
- **Planned Giving Components**
 - PG Case Statement
 - PG Donor Testimonial
 - PG Program: Society Benefit

As needed:

- PG Ways To Give
- Gift Designation Instructions
- Gift Intention Form

Determining Capacity & Interest

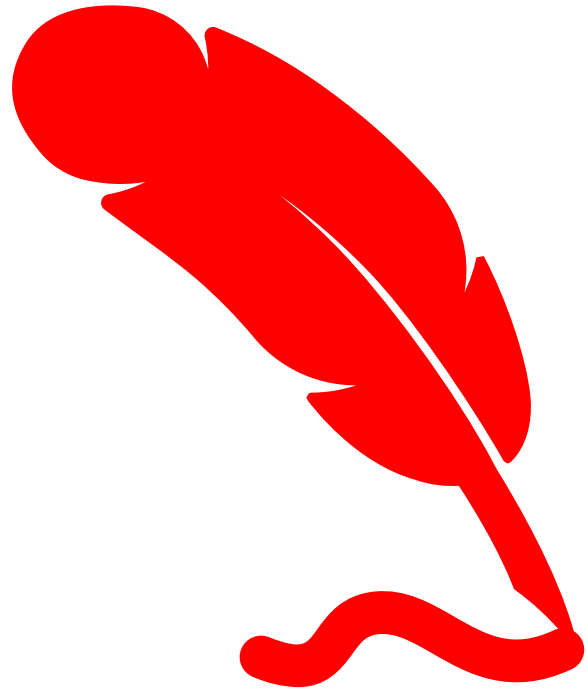


- Taking time to cultivate
- Building a trusting relationship
- Solve problems
- Gifting strategies

Gift Options – Level 1

- **Bequests / Beneficiary / Remainder**
- **Life Insurance**
- **Retirement Plan**
- **Donor Advised Fund**
- **Gift Annuity**



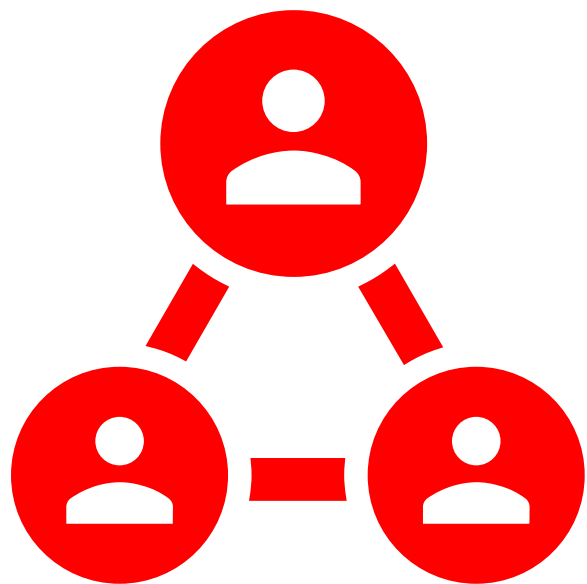


Gift Options – Level 2

- Gift annuity
- In trust / CRT
- Business interest
- Real estate / Life estate / Property

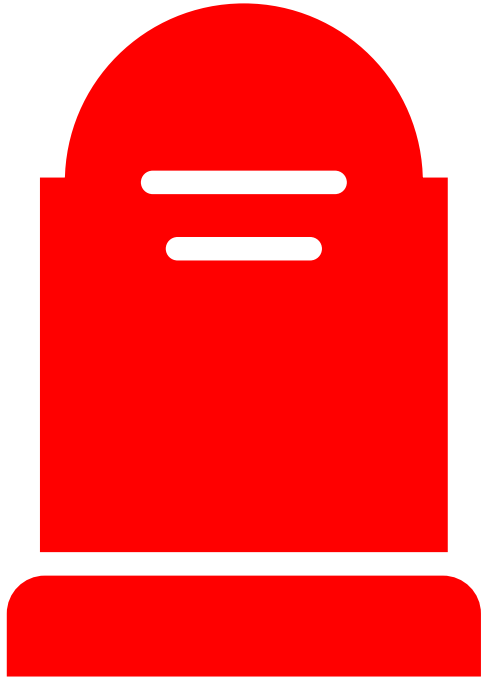
SOP!

- Gift Acceptance
- Gift Use
- Gift Counting
- Endowment
- Investment Statement
- Giving Council



Donor Retention Matters!

Here's How to Increase It



What Happens When the Donor Passes Away?

- Expressing condolences
- What is your goal?
- The reason you follow-up?
- How much information do you need?



Planned Giving: Annual Planning

- Objective: Estate, Endowment, etc.
- Goal: Participation or Monetary
- Team Support
- Marketing Efforts
- Development Efforts
- Evaluation

What happens if you lose control of the plan?

**Evaluating
Organizational
Capacity**



**Implementing
Multi-Channel
Outreach**



- 1. Recognize Intent**
- 2. Build Donor Pipeline**
- 3. Internal Infrastructure**

**Results driven
formula!**



**Thousands of Loyal
Donors are Just Waiting
for You to Ask!**

Questions?

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