PROMOTING YOUR PLANNED GIVING PROGRAM

Your organization has built a planned giving program and now you're looking for creative ways to promote these giving opportunities to your constituents. Consider hosting a planned giving seminar to help educate donor prospects about their legacy giving options.

Planned giving seminars are an effective, low-cost way to promote your legacy giving program, and they provide your donors with valuable information about creating a financial strategy in their sunset years and the benefits of charitable giving.

Five Best Practices for Creating a Successful Planned Giving Seminar

1. Keep it simple.
Provide an intimate setting by hosting your seminar onsite at your ministry. No elaborate catering or meal is needed. Provide light refreshments like coffee and donuts.

2. Identify Your Audience.
Identify potential planned gift donors from your constituent file and be sure to include major donors, monthly givers, board members and long-standing volunteers who give financially. Target a guest list between 50 and 100 people with the expectation that about 15 to 20 percent of invitees will attend.

3. Keep it brief.
Limit your seminar to one hour. Focus your discussion on one main topic related to legacy giving. Don't attempt to cover too much information and risk losing the attention of your donors or worse, overwhelming them. Be sure to leave additional time at the end of the seminar for guided tours of your organization.

4. Bring in an expert.
As a gift to your donors, invite a knowledgeable expert to educate them on a topic related to planned giving. Choose a topic of value and importance to your donors like how a Will can protect their families, how charitable annuities can provide retirement income or how a charitable trust can benefit their heirs.

5. Follow up promptly.

Your follow-up determines the success of your event. Donors are not expected to make a financial gift at the seminar; their gift will come later and that is why *how* and *when* you follow up is crucial. Leave donors with legacy giving handouts at the seminar and send a personal thank-you note a week after the event. Follow up with a phone call two to three weeks after the event to answer any questions they might have.

Reminder: You are not the Expert

You and your planned giving materials are only meant to guide and motivate donors – you're not expected to be a financial or tax expert. Compile a list of reputable attorneys, financial planners, tax advisors and planned giving experts – independent of your board and staff – to advise both the Mission and your planned giving prospects. Or encourage your donors to reach out to their own financial planner. You want to be prepared to answer any and all donor questions that result from the seminar.

Start Planning!

Utilize planned giving seminars as a tool to educate, encourage and engage your legacy giving prospects. With our "Five Best Practices to a Successful Planned Giving Seminar" as your guide, your seminar is sure to inspire donors and bring them closer to your nonprofit.

This strategy sheet is provided to you by Brewer Direct's Academy and can be located in the Library. If you'd like to discuss the ideas found here or want to know more about the Academy, contact Shellie Speer, Senior VP, Academy at **sspeer@brewerdirect.com** or **(719) 210-6207.**

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