



IF YOU THINK OF PLANNED GIFTS AS SEPARATE, SO WILL YOUR DONORS

Are you waiting for that special moment to talk to a donor about leaving your nonprofit in their will?

Why not talk about it all the time? It's just an option, like all the other gift options so why not treat it that way? **If you treat these (long-term and deferred) gifts as separate from annual gifts, so will your donors.**

As a prospective donor, I want to read and hear about people who are making all kinds of gifts all the time. I don't read generic mailings that target me as a planned gift donor. I want to read inspiring stories about all the good work donors and volunteers are doing and all the ways they make it happen. This fuels my imagination and inspiration.

TAKE ACTION: What donors can you meet with each week to share your development plans for the year?

- Talk about growth, vision and let your donors know that all sorts of gifts are needed.....talk about how the whole organization functions, speak of it as a whole picture.
- Integrate your discussions about current operation funds AND long-term gifts. As you do, notice your donor's reaction. It will cue you as to the cultivation steps you can take with that donor.
- Write down these cultivation steps and mark follow-up dates on your calendar. Dates and steps may be changed as insights during the year are clarified. Writing down the steps is the starting point.

This is how you set the stage for people who may be thinking about it and haven't mentioned it to you. This is how you attract the un-planned nice surprises.

TIPS:

- Talk about what your nonprofit needs (annual AND deferred) as an integrated master plan for achieving growth goals. Talk about it so much that it becomes automatic and you don't have to think about it anymore.
- Talk about it from the heart, from your heart. It will have more meaning.



- complex planned gifts before you've completed one creates mental anguish. Stick to what has already happened and take it a step-at-a-time.

A powerful tool is your newsletter. You don't need specialized training or planned giving materials to communicate the message about deferred gifts. Use your newsletter to demonstrate that giving is one big, comprehensive picture.

For tips about writing a newsletter that ties it all together, please look on my "Free Resources" page for an article entitled, "A Newsletter That Ties It All Together." These tips are based on a real-life example of a newsletter that I receive in the mail on a regular basis.

It proves that small, young nonprofits can raise all kinds of gifts by maximizing the tools at hand. Definitely, don't wait until you feel you are thoroughly versed on planned gifts to start talking about them. Do so now in a way that makes sense.