

Basics of Planned Giving

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What is planned giving?

Integration of Donor's

- Personal Goals
- Financial Goals
- Estate Planning Goals
- Charitable Goals

Creates an opportunity for giving when otherwise not possible.

A unique way to ask for support.

Interesting facts

- Single, childless females are the most frequent givers during life and at death
- Only 10% of lifetime givers leave a bequest
- 73% of widows change financial planners within a year of husband's death

Death

- Thoughts?
- How do you feel when you hear the word?
- How do you think your donors may feel?
- How would you react if a donor said they've left your organization in their will?
- Can be exhausting to talk about



Words that scare people

- Death
- Estate
- Will

What you see



Seminar Tonight:
Estate Planning

What the
subconscious sees



Seminar Tonight:
**Your Upcoming
Death**

Words that are less scary

- Legacy
- Honor a loved one
- Causes you care about
- Make a lasting impact
- Tax-smart giving
- Senior concerns

Trigger phrases

- Someone with an affinity for the university says now is not a good time for a donation
- Someone with few liquid assets has life insurance, a retirement plan, or some other asset to be paid out in the future
- Leaving us a portion of what's left doesn't crimp their current lifestyle or hinder future care
- Desire to leave a legacy
- Desire to honor a loved one
- Selling their business in the next few years
- Paying too much in taxes

Someone says they have included us in their plan

- Ask for a copy of that portion of their document
- Allows us to make sure details such as our tax ID are correct, so donor's intentions are fulfilled later
- Allows us to also make sure it's not too restrictive

Questions and Discussion