

# The NONPROFIT ACADEMY

*TheNonprofitAcademy.com*

**PRESENTS**

**START YOUR PLANNED GIVING THIS YEAR**

*with Tony Martignetti, Esq.*

**Planned Giving Accelerator**

**#npapresents**

# Where We're Headed

- What is Planned Giving
- Who are the best prospects
- How to get started
- Promotion tips
- Continuing Ed.
- Q&A

# What is Planned Giving

A method of charitable giving in which a donor considers their retirement plan and family estate plan, and  
For today, means cash to a nonprofit at the donor's death

# Get A Finger, Grab A Hand

amazon.com<sup>®</sup>

Celebrity **X** Cruises



# Who Are The Best Prospects for Planned Giving

- They love your work
- Age and giving history are meaningful
  - 55-60 & over
  - consistent donors
- Women's role in philanthropy, especially PG
- Look to your board for leadership

# Mandatory Takeaway 1

**NOT ONLY FOR  
YOUR WEALTHY  
DONORS**

# How to Get Started: Charitable Bequests

- Never know about all the gifts
- OK, understand the value in residual estates
- No more popular planned gift
- Please look back at giving history to be amazed
- Really easy for your donors
- Obligated to respect your small lifetime donors
- First cash, but anything of value possible
- It's about donors talking to their attorneys
- Time to start or grow your endowment
- About the value of long-term gifts to your mission & values
- Certainly, death is not what you're not talking about
- A very respectable PG program can stop right here

# Mandatory Takeaway 2

**YOU CAN HAVE A VERY  
RESPECTABLE PLANNED  
GIVING PROGRAM ONLY  
PROMOTING BEQUESTS**



# If You Decide To Go Further

- Living Trusts
- IRA Rollover (Qualified Charitable Distribution)
- Financial Asset Beneficiary

# If You Decide To Go Further Still

- Charitable Gift Annuities
- Charitable Remainder Trusts
- Retained Life Estate
- Charitable Lead Trusts

# Where We Are

- √ What is Planned Giving
- √ Who are the best prospects
- √ How to get started

## STILL TO COME

- Promotion tips
- Continuing Ed
- Q&A



# Marketing: Events

Drop a few speaking points into remarks & sidebar in your program

# Marketing: Print

Sidebars or articles in your newsletter and annual report

Annual report: Recognize PG donors & invite others

# Marketing: Digital

Sidebars or articles on your e-newsletter

Simple page on your website

Email signature:

“You can include us in your will, ask me how”

# Marketing: Direct Mail

Drop a buckslip in existing packages

Use your reply envelope flaps for self-selection  
check of

If budget allows, this is the gold standard

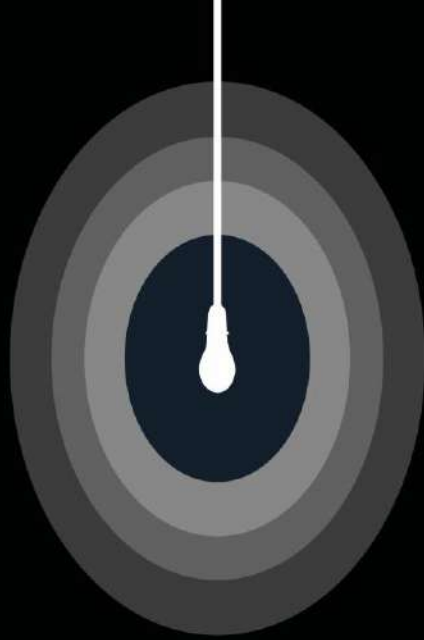
# Where We've Been

- √ What is Planned Giving
- √ Who are the best prospects
- √ How to get started
- √ Promotion tips
  - Continuing Ed.
  - Q&A



# Continuing Ed. Multimedia Style

- Free How-to Guide: “*Unleash the Game-Changing Power of Planned Giving at Your Nonprofit*”  
-- Text “GUIDE” to 56525
- Planned Giving Accelerator membership: Deepest dive into everything I know about starting your program in 2021; next class starts 4/1  
-- [PlannedGivingAccelerator.com](https://PlannedGivingAccelerator.com)
- Book: *Planned Giving Simplified*, Robert Sharpe, Sr. (Wiley)
- *Tony Martignetti Nonprofit Radio*  
-- #1 podcast for nonprofits & much more than PG



# The NONPROFIT ACADEMY

*TheNonprofitAcademy.com*

**Keep The Conversation Going!**

*[HTTP://THENONPROFITACADEMY.COM/FORUM/](http://THENONPROFITACADEMY.COM/FORUM/)*

**#npapresents**