

Now What?

Stewarding the Planned Gift Donor

Planned Giving Council of NE Florida
February 8, 2018

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What do you think you need for a planned giving program?

- **Basic knowledge**
- **Marketing plans**
- **Knowledgeable volunteers**
- **Planned giving committee**
- **Stewardship plan**



Fact

Nearly 80% of planned giving donors also gave 15 or more gifts during their lifetimes to the nonprofits named in their wills.



Fact

- **Giving by bequests increased 13.6% in 2014, as reported by 2015 Giving USA report.**
- **According to UBS Wealth Management America, 52% of wealthy people plan to leave a big share of their wealth to charity when they die.**

Fact

Most planned gifts are 10, 100, or 1,000 times larger than the donors' outright lifetime gifts.



Fact

- **It's not about taxes and finances**
- **It is about philanthropy**
- **It is about legacies**
- **It is about making the world better**



Planned Giving Donor Profile

- **Profile of a planned giving prospect (usually long history and extensive knowledge about institutional programs)**
- **Unlike many smaller annual or major lifetime gifts, planned gifts are often a gift of a lifetime and entail entirely different considerations**
- **Understand that this is often a long-term timeframe**

Annual Givers and Planned Givers have similar profiles

- **Want to support organization**
- **Want to keep their assets until a later time**

Vehicles

- **Current/cash**
- **Bequest**
- **Life income:**
 - **Charitable Gift Annuities**
 - **Charitable Remainder Trusts**
- **Charitable Lead Trust**
- **Retained Life Estate**
- **Life Insurance**
- **Retirement Plans**



Planned Giving & Campaigns

- **Important component**
- **Follow process of Marketing, etc.**
- **How to count planned giving**
- **Accounting vs. counting**
- **Long-term strategy**

Now What? Stewarding the Planned Gift Donor

So what's next? You have documented a planned gift which may be realized several decades from today. Who knows if you will even be with your current nonprofit. What is my role in stewardship and what does that look like?

Now What? Stewarding the Planned Gift Donor

During this interactive session we will discuss and share different ways to keep deferred giving donors engaged and how best to transfer these long-term relationships as staffs change over time.

Question 1

What is stewardship?



Question 2

List basic stewardship techniques that you or your non-profit can use



Basic Stewardship Techniques

1. Thank you's when gift is documented
2. Thank you lunch with senior leadership
3. Gift agreement documenting gift
4. Create deferred giving society
5. Annual dinner for donors

Basic Stewardship Techniques

- 6. Publications- all sorts of options**
- 7. Annual letter from head of program
which donor is supporting**
- 8. Invitations to events**
- 9. At least 2 contacts per year**
- 10. Maintenance level- high and low**

Question 3

How do you steward a two-life planned gift when first person dies?

- **Funeral**
- **First month**
- **Six months**
- **One year and beyond**
- **Timing of story in publication**

Question 4

Seamlessness and Transition

- **Nomads**
- **Risk between planned givers and outright donors**

Transition Examples

- 1. Explain why leaving**
- 2. Keep it positive**
- 3. Follow it with written communication**
- 4. Broker replacement**
- 5. Brief successor**

Question 5

Ethical Considerations

- **Maintaining relationship?**
- **Donor changes designee**
- **Executor/executrix of estate**
- **Personal benefit**

Final Thoughts

**Is there anything else
you'd like to discuss?**