



Fundamentals In Planned Giving

How To Build Your Prospect List and Know
WHEN IT'S TIME FOR A CONVERSATION

John Erstling
Senior Vice President of Community Engagement

Donna Morrow
Director of Development

LEGACY



"It takes a nobleman to plant a seed for a tree that will someday give shade to people he may never meet."

-David E. Trueblood

Session Outline

I. Developing Your Prospect List

II. Donor Engagement Strategies

III. Donor Case Studies

Developing Your Prospect List

What To Ask Yourself

- What types of planned gifts are you seeking?
- What is your donor's financial situation?
- Who are your most frequent, long-time donors?

Developing Your Prospect List

What To Consider

- Age
- Life Transitions
- Wealth Screening/Research
- Other Demographics

Engagement Strategies

How To Prepare For Planned Giving Conversations

- Donor Cultivation and Research
- Legacy Society
- Endowment Program
- Dedicated Communication Strategy and Plan

Engagement Strategies

Communication Strategy

- Direct Mail
- Organization Literature/Business Cards/Letterhead
- Newsletters (Print and Electronic)
- Web/Social

Engagement Strategies

How To Have Planned Giving Conversations

- Secure The Meeting
- Ensure A Donor-Directed Conversation
- Define The Legacy To Be Created
- Follow Up.....

Donor Case Studies

Case Study # 1: Marilyn

- 73 year old widow
- Loyal organization volunteer
- Modest, yet consistent annual donor
- Enjoys attending organization events
- Has capacity for larger gifts, but little success to date

Donor Case Studies

Case Study # 2: William

- 66 year old local business owner
- Personally, yet indirectly, impacted by our mission
- Previous donor, yet intermittent giving
- Initial support was an event sponsorship
- Significant capacity for larger gifts

Donor Case Studies

Case Study # 3: Jonathan

- 55 year old widower
- Personally impacted by our mission
- Made a small memorial gift with purchase of an engraved paver
- Loyal monthly donor, supportive of our work
- Qualifies for our leadership giving society at the lowest level
- Enjoys attending organization events

Donor Case Studies

Who are your donors?

What is the best strategy?

What did you do?

THANK YOU!

Please contact either of us if we can be of assistance to you and your planned giving program.

John Erstling

904.407.6359

jerstling@communityhospice.com

Donna Morrow

904.407.6136

dmorrow@communityhospice.com

