

WHEN YOU HAVE DONE EVERYTHING ELSE, TRY PLANNED GIVING

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JACKSONVILLE, FLORIDA

FEBRUARY 7, 2019

ARE BANANAS REALLY THE ISSUE?



ARE BANANAS REALLY THE ISSUE? *PLEASE CONSIDER....*

“AT ONE UNIVERSITY WHERE I WORKED, AN OLDER LADY WHO’D ALREADY DONATED SEVERAL, MAJOR GIFTS USED TO CALL ME AT LEAST TWICE A MONTH TO SAY SHE’D SPOTTED CHEAP BANANAS. “WILL YOU BE OUT MY WAY SOON?” SHE’D ASK.

“SURE,” I’D SAY, AND I’D DRIVE OUT TO TAKE HER TO THE STORE FOR BANANAS.

AFTER MONTHS OF THESE TRIPS, ONE DAY I SAID, “MARTHA, HAS IT EVER OCCURRED TO YOU THAT IF YOU WANTED YOU COULD BUY A STORE, OR EVEN A BANANA PLANTATION?”

“AH YES”, SHE REPLIED SWEETLY. “BUT THEN I WOULDN’T HAVE YOU TO CHAT WITH, WOULD I?”

AND THAT’S THE THING ABOUT PLANNED GIFT FUNDRAISING. IT’S NOT LIKE THE ANNUAL FUND OR ANYTHING ELSE. PEOPLE WANT TO BE WITH YOU, WANT TO DEVELOP LONG-TERM RELATIONSHIPS WITH YOU.

BY THE WAY, WHEN MARTHA DIED, SHE LEFT THE UNIVERSITY \$10 MILLION.”

WHAT ARE PLANNED GIFTS?

GIFTS FROM A DONOR COMMITTED TO AT ONE POINT IN TIME AND RECEIVED BY A NON-PROFIT
(OR BENEFICIARY) AT ANOTHER POINT IN TIME.

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ARE PLANNED GIFT PROSPECTS DIFFERENT THAN MAJOR GIFT PROSPECTS?

PAUL'S OBSERVATION:

ALL MAJOR GIFT DONORS CAN MAKE A PLANNED GIFT, BUT NOT ALL PLANNED GIFT DONORS WILL MAKE A MAJOR GIFT.

IN A PLANNED GIFT, THE DONOR CONTROLS: WHO/ WHAT/ WHEN/ HOW

INTEGRATING PLANNED GIVING INTO YOUR DEVELOPMENT PROGRAM

A CONVERSATION....



SHOULD WE CONSIDER PLANNED GIVING?



WHY SHOULD WE?



WHY DON'T WE DO PLANNED GIVING?

WHAT BARRIERS KEEP US FROM STARTING A PLANNED GIVING PROGRAM?



HOW CAN WE OVERCOME THE BARRIERS?

WHAT TOOLS DO WE NEED?

time



CONFIDENCE



BOARD/ MANAGEMENT/ LEGAL—TECHNICAL/ CLERICAL

HOW CAN YOUR ORGANIZATION'S STRATEGIC PLAN MOTIVATE YOUR DONORS?

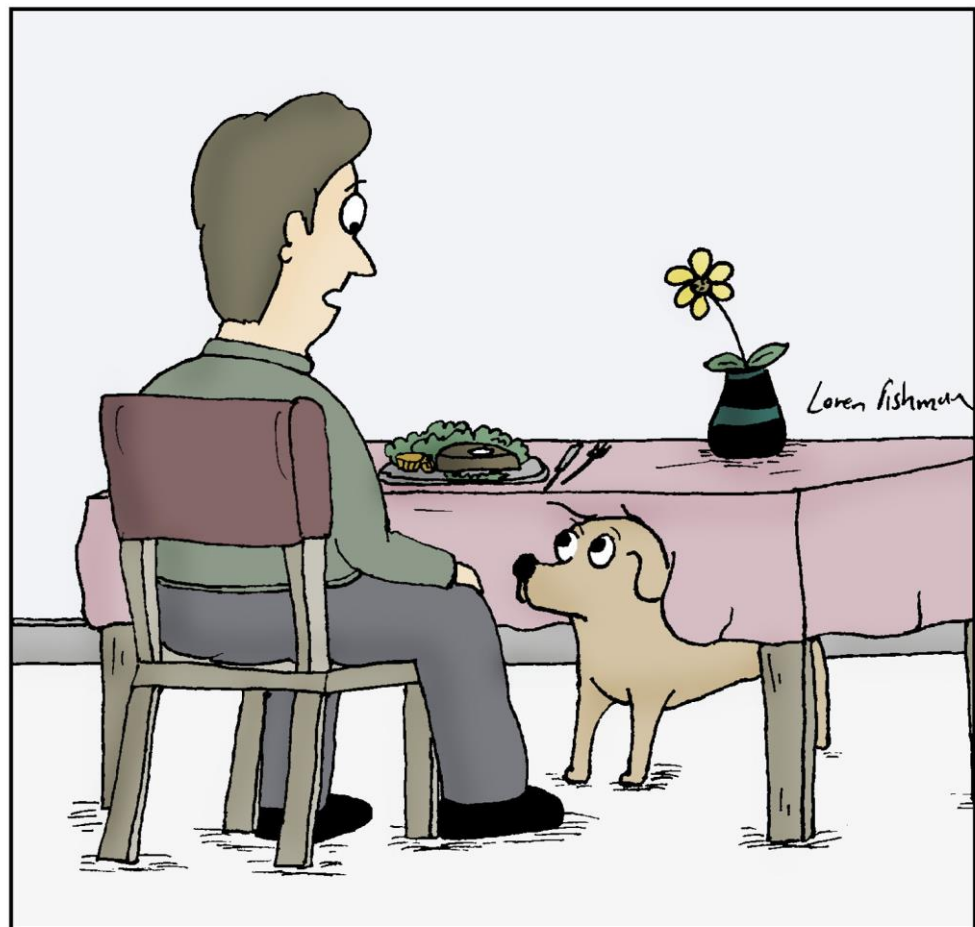


THE **BIGGER** THE VISION THE **BIGGER** THE GIFT?

WHY IS THE IRS INVOLVED IN PLANNED GIVING?

- PLANNED GIVING INSTRUMENTS
- INCOME TAX INCENTIVES
- ESTATE TAX CONSEQUENCES
- REGULATIONS





“Sorry, but under-the-table donations aren’t tax deductible.”

WHAT TYPES OF PLANNED GIFTS ARE THERE ?

- 401 K
- BEQUEST
- LIFE INSURANCE POLICY
- CHARITABLE GIFT ANNUITY
- CHARITABLE REMAINDER TRUST
- CHARITABLE LEAD TRUST
- LIFE ESTATE CONTRACT
- OTHER



HOW DO YOU FIND PLANNED GIFT PROSPECTS?

- ARE DONORS SELF-SELECTING THEMSELVES FOR PLANNED GIVING FOLLOW UP?
- UNDERSTANDING WHO IS ON YOUR LIST
 - WHO ARE THEY?
- PLANNED GIVING AUDIT / DEVELOPMENT PLAN
 - 3 YEAR WINDOWS
 - BE SYSTEMATIC
- DONOR RESEARCH
 - INDIVIDUAL PROFILES
 - MASS SCREENING
 - TRENDS WITH YOUR BASE



GENERAL PLANNED GIVING PROSPECT MARKERS

- INTEREST IN THE ORGANIZATION OR CAUSE
- OVER THE AGE OF 60
- LONG TIME DONOR
- NO KIDS OR FEW KIDS
- **GIVING 10 YEARS OR LONGER**
- **ORGANIZATIONAL RELATIONSHIP CAN BE PERSONAL OR NON PERSONAL**
- **NO RELATIONSHIP TO SIZE OF CURRENT GIVING AND PLANNED GIFT**
- **OTHER CHARITABLE BENEFICIARIES**



WHAT SHOULD WE FIND OUT WHEN WE IDENTIFY AN INTERESTED PROSPECT?

THE 4 P'S (ROBERT F. SHARPE COMPANY)

- PEOPLE
- PLANS
- PROPERTY
- PLANNERS



PLANNED GIVING VEHICLES



Bequests



ARE BANANAS REALLY THE ISSUE?

“HOW MANY PEOPLE DO WE KNOW THAT NEED A ‘PERSONAL’ CALL OR A LITTLE ATTENTION... BECAUSE IN THE END IT ‘AIN’T’ THE BANANAS, IT’S YOU WHO MAKES A DIFFERENCE!”

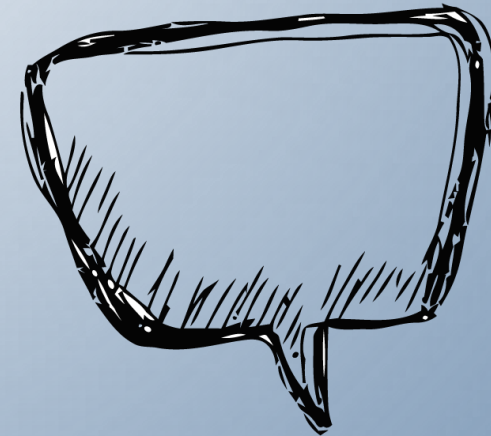


PLANNED GIVING VENDORS

- STELTER - [HTTPS://WWW.STELTER.COM/](https://www.stelter.com/)
- CRESCENDO - [HTTPS://WWW.CRESCENDOINTERACTIVE.COM/](https://www.crescendointeractive.com/)
- ROBERT F. SHARPE - [HTTP://SHARPENET.COM/](http://sharpenet.com/)

THINGS THAT COME UP IN CONVERSATIONS

- LIFE-LONG EXPERIENCES & STORIES / INVOLVEMENT WITH ORGANIZATIONS
- HISTORIES OF FAMILIES
- WHAT OTHER PEOPLE THEY KNOW ARE DOING
- REAL ESTATE & INVESTMENTS
- TAXES & POLITICAL STANCES
- DEATH & DYING
- EVERYTHING ELSE



WHAT'S GOING THROUGH PEOPLE'S MINDS?

- **THE CORRESPONDENCE / MAILINGS**
 - **DO THEY LIKE CORRESPONDING WITH YOU?**
- **PEOPLE ARE GOING OFF WHAT THEY KNOW**
 - **LIFE EXPERIENCES INFORM DECISIONS**
 - **COMFORT WITH WHAT'S HAPPENING**
- **DO THEY THINK LEAVING YOU MONEY WILL MAKE THE WORLD BETTER?**
 - **THERE IS A SLICE OF LIFE THEY CARE ABOUT THE MOST**
- **FINANCIAL REASON TO LEAVE MONEY**

