

Social Media For Planned Gifts

Crescendo
INTEGRATED MARKETING FOR PLANNED GIFTS



Case Study



- www.chapmanlegacy.org
- Never going to close a planned gift from Facebook
- Plant a seed to engage people, build relationships and identify unknown prospects
- <https://www.facebook.com/HeritageSociety>

What type of Facebook page?

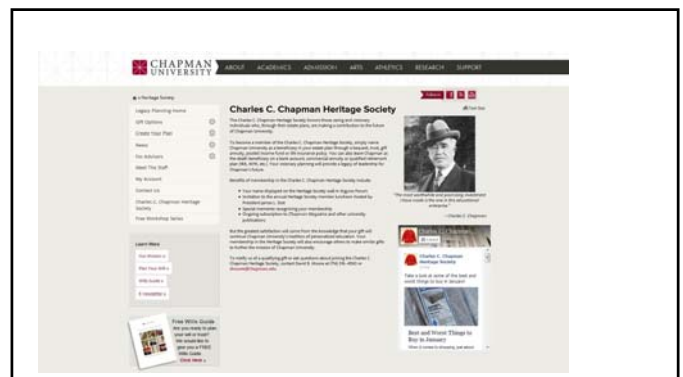
- Chapman University



- Chapman University Alumni



- Charles C. Chapman Heritage Society



Facebook Goals

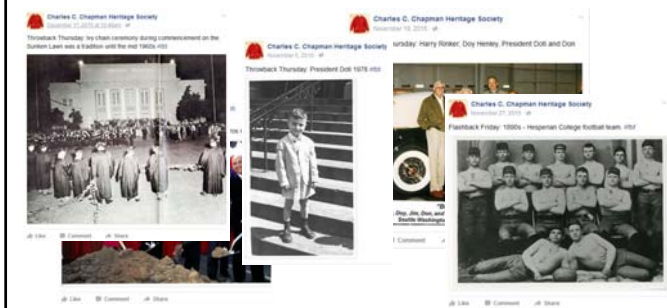
1. Keep them interested in Chapman
2. Make it worth their while
 - Interesting, relevant, helpful, resourceful
3. Remind them that we care



Most Successful Posts #3



Most Successful Posts #2



Most Successful Post #1



Chapman Interest

Charles C. Chapman Heritage Society
 It's always wonderful to see the many Chapman University alumni across being in the States.
 Chapman University

Charles C. Chapman Heritage Society
 The Chapman Family has lost one of its stars. We are saddened to share that Professor Emeritus Jim Miller passed away on November 11, 2015. Considered one of the most beloved faculty members in Chapman history, Professor Miller taught for 47 years until his retirement in 2003.
 Chapman University

Charles C. Chapman Heritage Society
 Don't forget about Winterfest tonight!
 Winterfest forecast? Get ready for snow flurries, hot cocoa and fun!
 The lights of vibrant Plaza will dazzle you, twinkling white lights for the winter festival is a sight to behold. Don't miss the lights of their debut at the annual.

Human Interest

Charles C. Chapman Heritage Society
 How Lucking and Prisha Chen provide an amazing example of how education, as both entrepreneurial and professionals. What do you think of the new generation?
 Mark Zuckerberg says he's giving 99% of his Facebook shares — 8.7 billion — to charity.
 How business professor Prisha Chen gave was 8th class Facebook shares — 1000.

Charles C. Chapman Heritage Society
 Take a look at some of the best and worst things to buy in January!
 Best and Worst Things to Buy in January
 When it comes to shopping, just about every month has good deals, and some not so good ones. So, what are the best and worst deals in January?

Charles C. Chapman Heritage Society
 If you are preparing for post-Thanksgiving shopping, take a look at this list.
 10 Tips for Efficient Black Friday Shopping
 A quick reference to the biggest shopping day of the holiday season.

Be a Resource

Charles C. Chapman Heritage Society
 How much have you thought about your retirement?
 B money roll-over to retire for during your 60s
 We know you get nervous about the major life decisions you're about to make.

Charles C. Chapman Heritage Society
 The IRA has been agreed and the IRA Charitable rollover is now permanent!
 THE IRA CHARITABLE ROLL-OVER IS NOW PERMANENT!
 IRA Rollover

Charles C. Chapman Heritage Society
 Is your 401(k) plan wisely managed?
 3 ways to check if your 401(k) plan is wisely managed
 Some ways to test if your plan is on the up and up.

Facebook Insights

All Posts Published

Published	Post	Type	Targeting	Reach	Engagement	Promote
01/08/2016 9:22 am	We're getting excited for the H&B art Museum of California Art Gra	Image	Targeted	4	0 0	Boost Post
01/07/2016 9:18 am	Throwback Thursday: Jeff to right @ Peter Ueberroth, Secretary Ge	Image	Targeted	210	8 2	Boost Post
01/06/2016 10:32 am	Take a look at some of the best and worst things to buy in Janua	Image	Targeted	11	0 0	Boost Post
01/05/2016 9:22 am	Check out this money minute article about investing your 401(k)	Image	Targeted	49	1 0	Boost Post
01/04/2016 8:00 am	WORDS OF A STUDENT: Sahni Mukherjee '15: "I wish I could per	Image	Targeted	145	3 2	Boost Post
01/01/2016 12:00 am	Happy New Year, Chapman Fam	Image	Targeted	110	6 7	Boost Post

Schedule of Posts

- Monday – Words of a Student
- Tuesday – Finance News
- Wednesday – Retirement/401k (MSN, Yahoo)
- Thursday – Throwback Thursday
- Friday – Interesting Article
 - Wedding Present
 - Event



Facebook Advertising



Facebook Advertising

- Advertisement of Legacy Guide
 - Age 30 +
 - Ran newsletter list through Facebook and found 3500 accounts
 - Target everyone on that list
 - \$250 budget
- January Ad
 - New Years Resolution- update Will



Results

- Reach
 - 10,767 people
 - 449 unique clicks
 - 214 likes of the ad specifically
 - 10 shares, 4 comments and 8 page likes
- Leads
 - 5 requests for a mailed legacy guide
 - 19 downloads of legacy guide
 - Majority of requests – female 35-44



Your Ultimate Goal?

MAKE. IT. PERSONAL.

PROMOTE YOUR ENEWSLETTER



LINK TO NEW WEB CONTENT



POST DONOR STORIES



LINK TO PLANNED GIFTS CALCULATOR



ADVERTISE DONOR EVENTS



Twitter



- Announce
- Invite
- Highlight
- Thank

- Link to Facebook
- Link to Blog
- Link to YouTube
- Link to Website

2015 Planned Gifts Email Marketing Study

Case Studies on Effective Use of Email for Planned Gifts



Data Overview

Period studied: July 1, 2014, through June 30, 2015.

- Charities sent 46.2 million planned giving emails from Crescendo servers last year. **Almost 90% of those emails were donor newsletters.**
- More charities (29.68%, up from 21.80% in the prior year) continued toward monthly regular distribution emails.
- Open rates for planned giving emails increased to 16.7%, as compared with 16.4% in the prior year.
- Special onetime eblasts featured the highest open rates of 21.2%.
- Overall opt-out rates remained at less than 1% again this year, falling to .15%.

Messaging

What You Say Makes a Difference



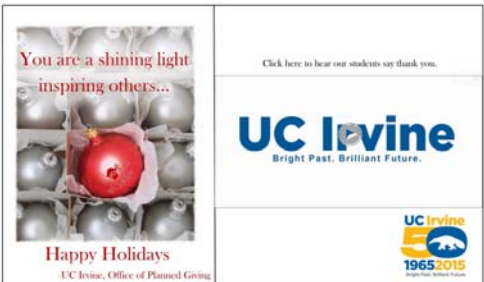
Messaging

Messages that resonate most with donors often include *you* or *your* and focus on how their support makes a difference.



“You Matter”


47%
Open Rate



Service Over Solicitation

54%
Open Rate

12,294
Recipients



How To Benefit Your Family Through Charitable Giving

Using a charitable remainder (CRAT or CRUT) or intentionally defensible irrevocable trust (IDIT) will create a regular stream of income for you or your loved ones and make a lasting impact of charity.

Charitable trusts may be funded with a variety of assets. This special is written to address the most assets and more appropriate to you or your loved ones. All of payments have been made. The essential pieces to build a trust. Assets include:

- Providing a steady stream of income (as opposed to a lump sum distribution)
- Making a legacy of support for our mission and work
- Creating a charitable legacy for education (a CRUT or CRAT) or other estate tax savings (form a TRUL)
- Making a portion of the capital gains on appreciated assets.


Contact us for a free consultation to see the benefits of a CRAT or CRUT for you.

1-800-865-3663 | www.bgs.org
WILLBERRY DANE

Charitable Bequest Messaging

37%
Open Rate

1,555
Recipients



BOYS & GIRLS CLUBS
OF METRO PHOENIX

A charitable bequest is an easy way for you to help the Boys & Girls Clubs of Metro Phoenix.

A charitable bequest is an excellent way for you to leave a legacy and help further our mission. A bequest is also one of the easiest gifts you can make. Your estate planning attorney can include a provision in your will that leaves a bequest gift to us. It could be a gift of a specific asset, a dollar amount, or a percentage of your estate. A bequest could also be made from the residue of your estate or what is left after all gifts have been made to your heirs.

Please contact us to learn about all of the benefits of making a charitable bequest and how it can help us continue our important work.

Paul Adams | 480.241.1200
V.P. of Administration | boysandgirls.org
Boys & Girls Clubs of Metro Phoenix | metrophoenix.org

2 \$1M+ Gifts

7 Donor Visits

- ### Top Performing Bequest Marketing Subject Lines
1. A charitable bequest is an easy way to help CHARITY NAME
 2. Endowing your gift with a charitable bequest is an easy way to help CHARITY NAME forever
 3. Have you thought about the future?
 4. Do you have a plan for the future?
 5. Have you made these important decisions yet?

Segmentation

Messages Are Not "One-Size-Fits-All"



Generational Marketing

16.1%

Open Rate

4,015

Recipients



Top Performing Gift Annuity Marketing Subject Lines

1. Create a CHARITY NAME charitable gift annuity today!
2. What does security look like?
3. Your charitable gift annuity can support CHARITY NAME
4. Discover lifetime security with a CHARITY NAME gift annuity
5. Gift annuities: understanding your many benefits

Women Supporters

29%

Open Rate

5,902

Recipients



Legacy/Heritage Society Members



56%

Open Rate

Age 69+


Previous CGA, DAF or Scholarship Donors

Branding

Known Entities Get More Attention




Branding



Branding

20%
Open Rate


PURDUE *Philanthropy at Purdue*



Trying to roll the world's largest stone through a round hole is a hard job... Taking advantage of the IRA Charitable Rollover, you can roll over your IRA and make your gift today.

PURDUE

PURDUE *News from Planned Giving*



Trying to roll the world's largest stone through a round hole is a hard job... Taking advantage of the IRA Charitable Rollover, you can roll over your IRA and make your gift today.

PURDUE

31%
Open Rate

Branding



Branding

40%
Open Rate

31,201
Recipients

Engagement

Engage and They Will Respond

“Share” With Us!

27.1%
Open Rate

Join Our Legacy Society

18.4%
Open Rate

Save the Date

38.9%
Open Rate

1,031
Recipients



Top Performing Seminars/ Webinars Subject Lines

1. What is a trust and what can it do for me?
2. Making a will seminar
3. Wills training workshop is this weekend
4. Estate planning with retirement benefits
5. Leaving a legacy, charitable gifts made easy

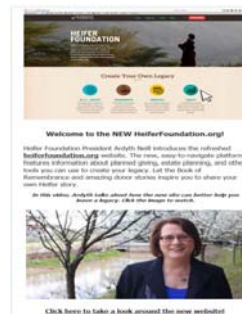
Complete Our Online Survey

47%
Open Rate

6,453
Recipients



Visit Our New Website



Personalization/ Subject Lines

Emails with Compelling Subject Lines
Get More Opens



Breaking News: IRA Rollover

39%
Open Rate

1,485
Recipients



13 Gifts
Received

Time is Running Out!

31.3%
Open Rate



Dear John,

With year-end around the corner, consider some options that may help you with your tax liability and support the University.

Charitable IRA rollover: You are 70½ or older and have a traditional IRA, certain other IRA or employer plan. You can roll your required minimum distribution out of your account and use it to fund the distribution in your health account.

Looking for additional benefits? Consider a charitable gift annuity or charitable remainder trust. Not only will you receive an income exchange for your gift, you will also receive a charitable income tax deduction.

Contact Eric M. Bair to find out more
and thank you!

www.uci.edu/etd

Top Performing IRA Rollover Marketing Subject Lines

1. Special Announcement: IRA Charitable Rollover Signed!
2. ACT NOW! IRA Rollover Extended Through December 31
3. The IRA Charitable Rollover Is Back
4. Take Advantage of the IRA Rollover Extension by December 31
5. Special End-of-Year Bulletin: IRA Rollover Passes

THANK YOU!

www.crescendointeractive.com

Questions?

Email: Molly@cresmail.com

