

40 Years of Experience –
We Know Stuff!

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We have some questions...

By a show of hands...

- How many of you are tasked with doing solely planned giving at the organizations in which you work?
- How many of you are full-time staff?
- How many of you have less than one year of experience in planned giving?
- How many of you have at least ten years of planned giving experience?
- How many of you represent organizations with a fairly new planned giving program?
- How many of you would like to refresh your planned giving program?
- How many of you are the only staff person at your organization dedicated to planned giving?



Outreach

- Who are your stakeholders?
- How do you disseminate your message?
- What are you messaging?

Prospect Management

- Identification
- Qualification
- Cultivation
- Solicitation



Stewardship

- Legacy Society
- Events and Activities
- Be creative...



Bring It Home

(Takeaways)

- Outreach
- Legacy tagline
- Cultivation and stewardship



Gratitude, Gratitude, Gratitude.

Thank you.

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