

**Using the Internet to Create  
An Effective Planned  
Giving Program**



**PowerSite123**  
Interactive websites that help you change the world  
powered by Charityfinders

**Planned Giving Conference  
5/5/17**

Presented by:  
Allan Pressel, CEO/founder  
PowerSite123  
877-456-3210  
[www.PowerSite123.com](http://www.PowerSite123.com)  
[Allan@PowerSite123.com](mailto:Allan@PowerSite123.com)



The 25th Annual  
**Planned Giving CONFERENCE**

## How Should You Solicit Planned Gifts Online?

Figure out what you want  
Ask for it  
Provide easy-to-find info on how to  
consummate the gift

- Options
- Brief description
- Detailed description
- Tax implications
- Interest rate calculations
- Example(s)
- Benefits

[www.powersite123.com](http://www.powersite123.com)



## It's All About The Relationship

- Planned gifts require a good relationship
- Use your website and social media
- Manage aspects of the relationship online

[www.powersite123.com](http://www.powersite123.com)




## Planned Giving Tips

25. Nurture and cultivate donor relationships

How can you help your PG donors?


[www.powersite123.com](http://www.powersite123.com)



## Planned Giving Tips

- 24. "Call me now" button
- 23. Interest form
- 22. Updated PG information
- 21. Videos
- 20. Success stories
- 19. Testimonials
- 18. Ability to contact actual donors


[www.powersite123.com](http://www.powersite123.com)



## Planned Giving Tips

- 17. Ask for feedback
- 16. Referrals
- 15. Donors-only section of your site
- 14. Naming opportunities
- 13. Donor Hall of Fame
- 12. Links, literature
- 11. Topics of interest to seniors
- 10. Accessibility

[www.powersite123.com](http://www.powersite123.com)



## Planned Giving Tips

9. E-newsletters
8. Tell the donor:
  - What you are planning to do with their gift
  - What you are doing with it
  - What you did with it
7. Stock market info (RSS)
6. Staff profiles
5. Professional advisor section

www.powersite123.com




## 4. Search Engine Optimization (part 1)

What are the key search engines?  
How do they work?  
200+ ranking factors!

What can you do to optimize your search engine standings?

- a. **Metatags**
  - Description
    - should be < 150 characters
  - Keyword
- b. **Choosing and Using Keywords**
  - < 5 keywords per page
  - Use keywords/phrases liberally in page title, headings, body
  - Use HTML tags to denote headings (e.g., H1, H2, etc.)
  - Use different keywords on different pages
  - Keep them updated
  - You should have a keyword in your website address.
  - You should have a keyword in your page title

www.powersite123.com



## Search Engine Optimization (part 2)


**Keyword selector tools**

- <http://www.profitshare.com/d/searchinventory/suggestion>
- Google Zeitgeist - [www.google.com/press/zeitgeist.html](http://www.google.com/press/zeitgeist.html)
- Google AdWords Keyword Tool - <http://www.google.com/select/KeywordToolExternal>
- Google Trends - [www.google.com/trends](http://www.google.com/trends)
- MSN Search Insider - [www.imagine-msn.com/insider](http://www.imagine-msn.com/insider)
- Yahoo Buzz Index: <http://buzz.yahoo.com>

**Links**

- a. **Incoming**
  - To count your links in Google, type "link:[www.yournonprofit.org](http://www.yournonprofit.org)"
- b. **Outgoing**
  - Choose relevant, reputable sites
- c. **Twitter account**
  - # followers
  - Tweet/retweets


www.powersite123.com



## Search Engine Optimization (part 3)

- d. **Use blogs**
  - Within your site
  - Interactive
  - Offer RSS feeds
  - Lots of incoming links
  - Submit your blog to technorati.com
- e. **Avoid splash pages**
- f. **Don't require cookies**
- g. **Use alt text (on every image)**
- h. **Robots.txt**
- i. **Search engines prefer HTML**
- j. **Search engines prefer text over graphics**
- k. **Don't use frames**
- l. **Be careful with Flash and JavaScript**
- m. **Create a site map**
- n. **All pages s/b easy to navigate to (esp. home page)**
- o. **Create focused pages**

www.powersite123.com




## Search Engine Optimization (part 4)

**Get listed in important directories:**


- The Open Directory Project: [www.dmoz.org](http://www.dmoz.org)
- Yahoo Directory: [dir.yahoo.com](http://dir.yahoo.com)
- ZoomInfo Directory: [www.zoominfo.com](http://www.zoominfo.com)

**Use conversion forms**

- Page titles should be descriptive, and <70 characters
- Purchase your domain name (URL) for as long as possible



www.powersite123.com



## Search Engine Optimization (part 5)

- Get your traffic rank at [www.alexa.com](http://www.alexa.com)
- Your site should display with or without the "www"
  - set up a permanent "301" redirect
- Keep your site updated frequently
- Videos
  - Register with search engines
  - Mobile optimization

**SEO is based on unknown and changing algorithms!**

www.powersite123.com



## Private Internet Consultation

I'd like to offer each of you a free private Internet consultation

One hour

Consultation includes:

- Assessment of your site/social media/SEO/marketing
- Recommendations
- How to easily implement

In person or by webinar

Include anyone you want (e.g., CEO/ED, board members, etc.)

In one location or several

I'll contact you in 1-2 days to schedule the consultation

Or email or call me with your preferred time

[www.powersite123.com](http://www.powersite123.com)



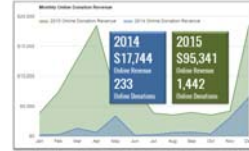
## 3. Google Grants

[www.google.com.grants](http://www.google.com.grants)

Google grants

In-kind advertising for non-profit organizations

Google Grants is a unique in-kind donation program awarding free AdWords advertising to select charitable organizations. We support organizations sharing our philosophy of community service to help the world in areas such as science and technology, education, global public health, the environment, youth advocacy, and the arts.



[www.powersite123.com](http://www.powersite123.com)



## 2. Donor Gratitude



[www.powersite123.com](http://www.powersite123.com)



## 1. Donor Impact

[www.youtube.com/watch?v=buYOcnISse0](http://www.youtube.com/watch?v=buYOcnISse0)



[www.powersite123.com](http://www.powersite123.com)



## Example PG site [www.aarpgift.org](http://www.aarpgift.org)

AARP  
FOUNDATION

HOME  
ABOUT US  
OUR WORK  
GET INVOLVED  
GRANTS  
FIND HELP  
NEWS  
WAYS TO GIVE  
DONATE

Welcome to  
GIFT PLANNING

Discover Ways to Give & Save

Gifts to AARP Foundation can take multiple forms and can help you address your personal financial goals and dreams. Do you want to make a significant gift during your lifetime, or would a gift as part of your estate work better? Do you have a particular asset that you are thinking of donating? Do you want to increase your retirement income, or is your primary goal estate preservation? Are you carrying surplus life insurance or a large balance in your retirement plan?

[www.powersite123.com](http://www.powersite123.com)



## Investment Donations

Provide all of your broker information online

- Include your DTC account #
- Online gift form
- Notification of donor intent letter
- Your name
- Name of the stock gifted
- Number of shares
- Designation of the gift
- Approximate date of expected gift

[www.powersite123.com](http://www.powersite123.com)



## Bequest Gifts

How to include our nonprofit in your will

Hint:

- Provide verbiage for the donor to copy and paste into their will
- Unrestricted Gift
- Gift for a Specific Purpose
- Specific Legacy
- Residuary Legatee
- Contingency Gift

[www.powersite123.com](http://www.powersite123.com)



## Life Income Gifts

Family obligations and the need to provide for retirement, coupled with the high cost of living, make it difficult for many people to consider substantial charitable gifts now. But there is a way to have the satisfaction of making a meaningful lifetime gift without sacrifice. In fact, you can get current income tax and financial benefits. It is called a life income gift. You irrevocably transfer some assets to our nonprofit now, and in return, you (and a survivor, if you wish) receive income for life. As a result, the assets are used to carry out our mission.

[www.powersite123.com](http://www.powersite123.com)



## Charitable Gift Annuity

The charitable gift annuity enables you to make a gift to support our nonprofit and at the same time improve the quality of life for your family. In exchange for your gift of cash or marketable securities to our nonprofit, we agree to pay you (and a survivor or other beneficiary) a fixed amount annually for your lifetime. The transfer is part gift and part purchase of an annuity. The rate of return is attractive and the payments are guaranteed for life.

[www.powersite123.com](http://www.powersite123.com)



## Charitable Remainder Trust

A trust is a legal agreement that specifies how the assets placed under the trust will be managed. The charitable remainder trust is an attractive method to achieve a variety of goals while providing income for life and knowing that after your lifetime, the property remaining in the trust will be used by our nonprofit as you specified.

[www.powersite123.com](http://www.powersite123.com)



## Life Insurance Gift

Some of our supporters no longer need their life insurance that was purchased years ago to provide for children or other family members. If that is your situation, please consider donating the policy to our nonprofit. You may claim a charitable deduction for approximately the policy's cash surrender value, and the proceeds are completely removed from your estate.

[www.powersite123.com](http://www.powersite123.com)



## Charitable Lead Trust

Individuals with very large estates can use a charitable lead trust to benefit our nonprofit and pass principal to family members with little or no tax penalty.

[www.powersite123.com](http://www.powersite123.com)



