



The **23rd Annual**

# Planned Giving CONFERENCE

presented by the **Northern California Planned Giving Council**  
in association with Colonial Consulting, LLC

## FUNDAMENTALS TRACK

Session 3: 2:15 pm - 3:30 pm

### Topic:

## Marketing Your Legacy Program

### Presented by:

**Greg Lassonde, CFRE**

### Workshop Summary:

This overview will cover a full spectrum of legacy giving marketing opportunities. Samples are interspersed throughout the presentation. Each section starts with basic, no-cost ideas, and then suggests more complex or costly options. There will be time for succinct questions, on topic, and a short Q&A section at the end. You should leave this workshop with concrete ideas no matter the size of your shop, or whether or not you have a legacy already in place. A "next steps" worksheet will be provided for you to take back to your shop.

## Workshop Presenter



**Greg Lassonde, CFRE**, has been working as a legacy giving specialist since 1992. He launched a legacy giving professional services consulting practice in 2007 and has built a diverse client base of more than 50 organizations both nationally, and primarily in the greater Bay Area, from Carmel to Santa Rosa. Greg speaks frequently on the West Coast and around the country on legacy giving.

Greg is also a partner with MarketSmart. They have a wide variety of products and services, and use sophisticated internet tracking technologies to help fundraisers focus on legacy and major donors most likely to support their organizations with current and future large gifts.

His fund development experience since 1982 covers the full spectrum of programs, executed in a wide variety of nonprofits, from KPFA Radio to the San Francisco Symphony. He is a past board member of the Oakland Zoo Foundation, past board member and officer of the Northern California Planned Giving Council, Silicon Valley Planned Giving Council, Development Executives Roundtable, Association of Fundraising Professionals - Golden Gate Chapter, Development Exchange, and Youth Radio.

**Greg Lassonde, CFRE**  
Legacy Giving Specialist  
P.O. Box 27427  
Oakland, CA 94602  
510-482-1502  
[greg@greglassonde.com](mailto:greg@greglassonde.com)

Marketing Your Legacy Program  
Northern California  
Planned Giving Conference  
April 29, 2015

Greg Lasonde, CFRE  
[www.greglassonde.com](http://www.greglassonde.com)



## Overview

- Print
- Digital
- Telemarketing
- In Person
- Q&A



## General

- Mission Focused
- Consistent Branding
- No cost first
- Budget for cost items (if any)
- Expand over time (years)
- Consistency is key



## Words to Avoid / Use Cautiously

- Planned Giving
- Estate
- Taxes-focused
- Bequest
- Charitable Gift Annuity
- Charitable Remainder Trust
- Charitable Lead Trust



## Some Definitions

- Prospects
  - Long term supporters w/ heart connection
- Suspects
  - Identified by an individual
    - Legacy ask
    - Peer review
- Qualified leads
  - Self-identified (check box, call in, etc.)
  - Legacy ask



## Print

- Direct Mail Response Form
- Newsletter / Annual Report
- Testimonial Mailing
- Poster
- Brochure
- Acknowledgment Insert
- Legacy Newsletter
- Other



## Direct Mail Response Form

- Front: Bequest Check Box
  - Avoid clutter
  - Simple short language



## Good Wording

**Membership contributions are tax deductible in excess of \$18.  
Tax ID#23-7186194**

- Please send information on including SMCHA in my will or trust.
- I would like to double the value of my gift through my employer's matching gift program. *(Please enclose matching gift form)*

San Mateo County Historical Association | 2300 Broadway |



# Crowded Envelope ...

My gift is in memory of \_\_\_\_\_ (name)  
My gift is in honor of \_\_\_\_\_ (name)  
for \_\_\_\_\_  
*(Birthday, Get Well, Anniversary, Thank You, Congratulations, Etc.)*

Please send notification of my tribute gift to:  
Name \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Please use this donation of \$ \_\_\_\_\_ for:  
 Charitable Care Fund  Unrestricted  Staff Appreciation Fund  Other \_\_\_\_\_

From \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Check is enclosed made payable to \_\_\_\_\_  
 Charge my donation to the following credit card:  VISA  MasterCard  
Account # \_\_\_\_\_ Expiration Date \_\_\_\_\_  
Signature \_\_\_\_\_

I would like to learn more about leaving an estate gift to \_\_\_\_\_.  
 I would like to take a tour of \_\_\_\_\_.  
 I would like to explore volunteer opportunities with \_\_\_\_\_.  
 I have enclosed a matching gift form from my employer.

Thank You for your gift. Your contribution is tax deductible.

# A Little Better With Box ...

I would like to learn more about leaving an estate gift to \_\_\_\_\_.  
 I would like to take a tour of \_\_\_\_\_.  
 I would like to explore volunteer opportunities with \_\_\_\_\_.  
 I have enclosed a matching gift form from my employer.

## Direct Mail Response Form

- Back: 3-4 legacy check boxes
  - 1) Info in will
  - 2) Life income plans
  - 3) In will / legacy society
  - 0) Free estate planning kit



## Newsletter / Annual Report

- Mailing Panel
- Display Ad
- Legacy Society Listing
- New Legacy Gifts Listing
- Testimonial / Article
- Response Envelope







## Display Ad



**Lew Hill Heritage Society**

**Founding Members for April:**

- ☒ Anonymous
- ☒ Anisa Gamal Birdspirit
- ☒ Susan Da Silva
- ☒ Phyllis and Bruce Johnston
- ☒ Don Kunitz

**Join the Lew Hill Heritage Society**

Bequests and charitable trusts to KPFA are used for major capital improvements and to build our endowment for public affairs programming. For more information call Greg Lassonde at: (510) 436-7970



## Legacy Society Listing

### Sister Mary Baptist Russell Legacy Society

enerously

The Sister Mary Baptist Russell Legacy Society consists of individuals who have thoughtfully included Mercy Retirement and Care Center in their estate plan through a legacy gift.

Thank you to these members of the Legacy Society for their ongoing commitment to the mission of Mercy Retirement and Care Center:

**Norma Ahern**  
**Anonymous (8)**  
**William F. Brusher**  
**Carl Arnoult & Aurora Pan**  
**Desmond & Helen**  
**Edwin\* & Marge Berberich**  
**Ross & Lillian Cadenasso**

**Natalie Cremer\***  
**Nancy Davis**  
**Margaret Gay\***  
**Celia Krieg\***  
**Sandra M. Miraglia**  
**Barbara Wickhorst**  
**Wayne Dexter Wong**

*\* Deceased*


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 many  
 g out your



## Testimonial / Article


page 2  
historical happenin




**SAN MATEO COUNTY  
HISTORICAL ASSOCIATION**

**DR. STANGER  
LEGACY SOCIETY**

**Historical Woodside Vineyards - Bob Mullen**



Bob Mullen's love of wine intersects nicely with County history. A first generation Californian, he moved here in 1954. He purchased a lot in Woodside and built a home there in 1961. Bob's appreciation for the county expanded deliberately through the ensuing decades. Early on he purchased additional land and launched a winemaking business, Woodside Vineyards. Self-taught, Bob has grown the holdings to some 26 relatively small parcels ranging from less than an acre to more than three. This use of land mimics vast vineyards that graced Woodside from the mid-1800s to Prohibition (1920). Eager to help preserve local history Bob got involved with the Woodside History Committee. It was easy to say "yes" to Mitch Postal's request to join the Association earlier this decade. Bob has included San Mateo County Historical Association in his will so that future generations will benefit from a sense of place.



The *San Carlos* played a pivotal role in bringing supplies north from Mexico to the California colonists. Find out more about this ship in the *Ships of the World* exhibit.

**MARITIME DAY - (continued from page 1)**

A pilot and aircraft mechanic, Faride Khalaf will discuss Fresnel lenses used in lighthouses. Khalaf's first tour of the Pigeon Point Lighthouse happened to fall on the 125th anniversary celebration of the first lighting. On that day, Khalaf saw a first order Fresnel lens in operation and promised he would never miss

## Testimonial Mailing

- Long term supporters
  - 3 years plus donors / volunteers / subscribers
  - Current board and alumni
  - Longer term staff
- Signer is legacy giver, usually bequest
- Closed-face #10 envelope

## Testimonial Mailing

- First class live postage
- No or low other postal markings
- Personalized one page letter
  - Signer's name letterhead
  - Dear (name)
  - Second color (blue) for letterhead/signature
  - No board of directors listing



## Testimonial Mailing

- Two enclosures
  - Bequest language
  - Legacy Society Description
- 1/3 sheet response form
  - Name / address
  - Phone, "preferred time to call" check boxes
  - Email
- #9 Response envelope (business reply)



## Poster

- Large tripod and/or table top at
  - Events
  - Office (if public traffic)
  - Other facilities
- Thank you / mission sentence
- Legacy circle listing
- Contact name and info
- Update annually



## Acknowledgment Insert



Who will preserve and promote San Mateo County history decades from now?

Do you want to help keep the history of our county alive forever? Will you help make our past available for future generations?

You can by remembering San Mateo County Historical Association in your will or trust.

Check the appropriate box(es) below and you'll receive helpful information. Or call (650) 299-0104 x235 and ask about the many ways you can make sure that the work of the Association continues to be promoted.

Please send the information on the following:

- How to include the Association in my will or trust
- Life income plans
- The Association is in my will. Send information on joining the Dr. Stranger Legacy Society.

Name \_\_\_\_\_

address \_\_\_\_\_

phone \_\_\_\_\_ email \_\_\_\_\_

MOISTEN, FOLD, SEAL AND MAIL



# Poster



Thank you to these Redwood Legacy Circle members who are leaving gifts to Save the Redwoods League in their wills, trusts or other type of legacy gift

Ms. Holly Anderson	Ruth Douglas Brown and Vern Brown	David and Susan Jones	Paul L. O'Neil and	Ms. Helen M. Stevens
Natalie Abell	Arthur J. Dunfield and Ruth E. Cooper	Mr. Stephen R. Jones and Ms. Nancy	Billy L. Pery-O'Neil	Mr. and Mrs. Franklin Porter Buckner
Oli and Teri Adams	Bernice A. R. Edwards	A. Dawson	Mary Ruth O'Brien	Donald and Elise Bruce
Jan and Maria Algranti	Bernice P. Edwards	Mr. and Mrs. Bill Jones	Mr. Albert Ottavio	Mrs. Cecilia M. Bruce
Wilson and Perry Alving	Ms. Kelly H. Edwards	Louanna and Michael Jorgensen	Mr. and Mrs. J. Spencer Overholser	Mr. Richard A. Burtis
Paul B. Ashmore	James D. Edwards, O.D.	Mary Lou Jung	Robert C. Page to Richard P. Bruch	Mr. Fredrick S. Burgin
Mr. and Mrs. Edif Anderson	Carol Edinger	Teresa L. Kahn	Mr. Donald J. Patrick	Ms. Elia Loretta Deussen
Mr. Roger W. Anderson	Doreen L. Elder	Mr. Steven A. Kane, Jr.	Dr. Helen Paulus	Ms. Linda L. Swartz
Mr. Horace L. Anderson	Margaret Elzema	J. B. E. Kester	Ms. Jane H. Paine	Ms. Lois Beatt
Ms. and Mrs. John A. Anderson	Ms. Catherine Elliott	Mr. and Mrs. Robert Kayson	Ms. Dale Paine	David W. Bennett
Steve and Susi Anderson	Ms. Craig A. Engel	Ms. Ruth L. Kelly	Constance C. Peckers	Ms. Karen J. Berger
Mr. Jim Angil	Constance Engel	Ms. Jane Kiser	Orson and Sue Perkins	Mr. and Mrs. John Tagham
Mr. Harold J. Anthony	Ms. Walter A. Eppler	Ms. Alberta M. Keller	Mary Charlotte Peters	Stephanie and Alan L. Tackington
Christine Anzla	Orrison and Walter Fulk	Ms. Nancy Keller	Lois L. and Eugene L. Peritte	Clare H. Taylor
A. Auldridge	Olivia J. Freese	Ms. Mary L. Kelly	Mr. Richard L. Peterson	Mr. John D. Taylor
Loretta and Janice Atherton	Ms. Daniel Flakinger	Ms. Norma J. Kelly	Mr. Kenneth B. Petre	David Toner
Mr. Arthur Austin	Ms. Lela K. Pipkin	Ms. Bernice A. Knott	Carl Pagen	Mary L. Taylor
Maureen B. Bales and W. Rozee	Stephanie Pugh	Ms. Noel Knutson	Pauline Jane and George Philak	Ms. W. Carol Tammeth
Russell Baldwin	Ms. Nadine D. Poley	Jenniah Kirwan	Ms. Stephanie M. Pope	Ms. Anne McPherson Tracy
Rich and Rose Barger	Patricia J. Pinsky-Riley	Patricia E. Klaber	Mr. Thomas A. Poirer	Anna Ukkari
David and Deborah Barnes	Robert S. Shirley Pinner	Helen L. Kopp	Ms. and Mrs. James E. Powell	Mr. Richard W. Van Alstene
Richard and Brenda Barnes -	Ms. Catherine E. Fox	Helen C. Kozig	Linda Verlooven Powers and	Ms. and Mrs. D. B. Van Winkle
Popcorn Rock	Ms. Richard M. Franz	Janice Kovacs	Eileen B. Powers	Ms. and Mrs. Ed Vano
Ms. Elaine C. Goodrow Barnett	Ms. Barbara J. Frazer	Ms. Edward A. Kozmick	Susan J. Fuller	Paula Wiegand and Joseph Over
Ms. Margaret N. Barron	Reba G. and Peter B. Frasier	Ms. Francis J. Koppes	Ms. and Mrs. George F. Putnam	Mr. Thomas Walker
Ms. Nancy L. Barrow	Mark Fulton	Donald and Brenda Krakauer	Mr. James E. Quirk	Ms. Holly Walker
Marie Babbage Barze	Ms. Paul H. Oardner	Ms. Lee Kahn	Mr. Philip Radford	Ronald O. Warfield
Mr. Jim Barbachian	Ms. William D. Oardner	Marion T. and John W. Kiern	Ms. Audrey D. Rasmussen	Richard B. C. Warren
Ms. William Beardsley	Holly K. Oardner	Robert E. Kiern	Ms. Kay Rensch	Ms. and Mrs. Jack Wesser
Mr. Stephen C. Beckwith and	Ms. Alfred D. Ocasio	Ms. Anita C. Ladewig	Reverend Kathryn W. Remmond	Shoshana Wheeler
Mrs. Patricia Breen Beckwith	Alan and Judith O'Neil	Mr. Lorraine Lantz	Ms. Lucie M. Rend	Nadine Wild
Ms. Paul P. Behr	Cliff and Maureen O'Neil	Richard W. Lewis	Ms. Viktor Reiff	Barbara Winkler
Ms. Marie P. Bevedes	Mrs. Wilbur J. Ooster	Ms. and Mrs. Ellen C. Revere		Ms. Frank W. Wisniewski
Edward L. and Mildred J. Bennett				
John A. Bessendorf				

For information on how you can create a legacy gift to the League, please contact: 415-435-2200 or [www.savetheredwoods.org](http://www.savetheredwoods.org)

SaveTheRedwoods.org *With Gracious Gifts™*



# Poster Top



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Edward L. and Mildred J. Bennett				
John A. Bessendorf				

<p>                 Mrs. Mary M. Israel                  George Istvan                  Robert and Harriet Jakovina                  R. S. James                  Allen Jamieson                  Reuben A. Jimenez and                  Joel Masotti                  Harry M. Johnson and                  Joyce O. Johnson                  Ms. Leila Johnson                  Ms. Patricia Johnson                  Mr. and Mrs. Charles P. Johnson                  Dr. William H. Johnston                  Don and Louise Johnston             </p>	<p>                 Lenore and Dale Meyer                  Bill Miller and Ida Houbby                  Mr. Alfred W. Moore                  Mr. Jim J. Mullins and                  Ms. Joan E. Baylie                  Ken and Madonna Mulmat                  Ms. Barbara A. Nabors                  Mr. George F. Neavoll                  Mr. Russell P. Neff                  Marilyn (aka Nikki) Nichols                  Margery Nicolson                  Mr. and Mrs. Michael Norris                  Florence C. Norstrom                  Ms. Jean M. Nusbaum             </p>	<p>                 Sonia A. Spalding                  Dolores M. Sprague                  Harriet L. Spree                  Mr. John A. Strka                  Mrs. Ruth S. Stahl                  Mr. John H. Staley, Jr.                  Dr. Chris A. Stamos                  Mrs. Jill Stanley                  Mr. Milton R. Stark and                  Mrs. Judith R. Stark                  Mr. Ellsworth F. Stein *                  Steven Lavine and                  Janet Sternburg (Lavine)                  Ms. Helen M. Stevens             </p>
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**For information on how you can create a legacy gift for the League,  
 please contact Sharon Rabichow, Planned Giving Officer, at  
 (415) 820-5828 or [legacy@SaveTheRedwoods.org](mailto:legacy@SaveTheRedwoods.org)**

**Walk Among Giants<sup>SM</sup>**

## Poster Bottom

<p>                     Elizabeth Schiller                      Schiller                      Soffer Family Trust                      Schneider                      Robert Z. Schwartz                      Sam Sejkora                      J. Shafer                      N. Shapiro                      Shaw                      W. Sheehan                      Sherman                      Kimball Shewmaker                      Siegel                      Siskelberg and                      Peter H. Christian                      Daniel Simon                      La Sirokskey                      V. Sirokskey                      Sloman                      Douglas Smith                      Mrs. Gene D. Smith                      Smith                      Steven Smith                      L. Smith                      My M. Smith                      Spalding                      Sprague                      Spree                      L. Strka                      S. Stahl                      F. Staley, Jr.                      A. Stamos                      Stanley                      R. Stark and                      Judith R. Stark                      F. Stein *                      Lavine and                      Janet Sternburg (Lavine)                      M. Stevens                 </p>	<p>                     Anonymous 54                      Anonymous 4                      As of March 31, 2012                      BOLD TYPE – Members of the Board                      of Directors, Councillors and Honorary                      Councilors                      * Recently deceased                 </p>	<h1>Legend &amp; Brochure Holder</h1>
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## Poster in Earlier Years



### Thank You ...

... to the following members of Heritage Society, organized in 1988 to honor those who have remembered Salem with a legacy gift in their wills and trusts or in some other way.

Mr. and Mrs. John Anderson	Doris Kraft*
Mr. Paul Basting	Ann Kutner*
Ms. Carol Beatty	Ms. Henrietta Larson
Mrs. Ethel Berg	Ms. Sherrell Mattson
Ms. Kathryn D. Bessey	Vivian McGettrick*
Mr. Eugene H. Clark	Mrs. Genevieve Mahorovich
Elaine Cochran*	Ms. Joan S. Nelson
Sister Patty Creedon	Mrs. Shirley Okelson
Mrs. Sue Day	Mr. Martin Picken
Mr. and Mrs. Earl Dalven	Zelma Carol Pulkifer*
Mr. and Mrs. Andre Ellert	Ms. Jarome Randolph
Mrs. Carol O. Elmstedt	Mrs. Mary Louise Randolph
Mr. Robert J. Erickson	Golden and Kaysee Ray
Alpha Femmes**	Ms. G. Edith Richardson
Mrs. Joan Farby	Robert and Sylvia Rinehart
Edwin Fox*	Mrs. Virginia C. Rose
Ms. Susan P. Fox	The Rev. and Mrs. Martin J. Schaefer
Mrs. Patricia Frumentti	Mr. and Mrs. David Silder
Mr. Guy Galbre	Mrs. Jane A. Sietner
Mr. and Mrs. Howard Hanson	Mrs. Betty L. Watson
Ms. Joan G. Hoopes	Lt. Col. Elsie Winkler*
The Rev. and Mrs. Edwin T. Heyne	Ms. Kathy Wigfield
Mr. and Mrs. Robert Hickman	Mrs. Helen Wood
Jean Jackson*	Mr. George Zaine
Ms. Esther Johnson	Margaret Zechman*

\*deceased

For information on making your own legacy gift contact  
Jo Ellen Peterson at (510) 434-2858.



## Event Brochure

- Used with poster only
  - Not for mailings
  - Not in person
  - 1,000 = several year's supply
  - brochure holder, velcro attached for stand
- Conventional approach
  - Several topics
  - Mailings / visits





## Acknowledgment Insert

- Self-mailer
- Business reply mail if in use
- Gummed closure implies confidential
- Mission paragraph
- 3 (4) check boxes
  - Bequest
  - Life income plans
  - Already in estate / legacy society



## Legacy Newsletter

- Estate, financial, gift planning ideas
- Legacy content from general newsletter
  - Testimonial / article
  - Complementing gift planning info
  - Intersecting estate/financial planning info
  - Display ad
  - New legacy gifts since last issue
  - Legacy gifts listing
  - Mailing panel



## Gift Planning

### Make Gift after Death without Attorney

Did you know there are many ways to make a gift after death that don't require legal assistance? You can do this through a designation. Just request and sign your institution's form that states how you want your money distributed when you pass on. The following assets can be gifted through a designation. State laws may vary.

- ✦ IRA or pension plans
- ✦ Life insurance
- ✦ Stocks and bonds
- ✦ Savings account
- ✦ Checking account

## Gift / Financial Planning

### Year-End Planning for Gifts & Taxes

Careful planning before December 31 can help you with tax-effective support for Save the Redwoods League and other favorite charities. Do any of these options help you this year?

#### IRA CHARITABLE ROLLOVER

In 2009 you can give up to \$100,000 to charity without it counting as taxable income. This fulfills your minimum distribution requirement. You must be 70½ or older to take advantage of the exclusion from taxable income.

#### MAKE THE BEST OF A MONETARY LOSS

Long-term investments that have decreased in value can be sold and the proceeds given to charity. The loss may be deductible, and the gift qualifies for a charitable deduction as well.

#### LOW-YIELDING ASSETS

Donate stocks, bonds or mutual funds to avoid capital gain tax, and the gift is eligible for a charitable deduction. Securities held over a year generate the most advantageous tax treatment.

#### BUSINESS TRANSITION

Contributing some or all of a family business or closely held stock can generate significant tax savings.

Create Your Legacy is published for longtime supporters of Save the Redwoods League to provide ideas that may be useful in financial, estate and charitable planning. This information is based on current federal tax laws, regulations and recent court decisions. Please always consult your professional advisors.



## Response Envelope

### I WANT TO HELP PROTECT THE FUTURE OF THE REDWOODS!

Please send me more information on how to make a meaningful legacy gift by:

- Bequest from will or trust
- Dedicating a grove:  
 during my lifetime    through my estate
- Retirement plan or insurance policy
- Although I have not notified you previously, I have already included Save the Redwoods League in my will or trust.
- I would like to make an additional contribution to support the work of the League. Enclosed is my gift payable to Save the Redwoods League in the amount of \$ \_\_\_\_\_.

My Name

Address

City, State, ZIP

Phone Number

E-Mail Address

Thank you for your gener



## Legacy Newsletter

- 1-3 x / year frequency
- Same audience as testimonial mailing
- Testimonial mailings timing: 2/2; 2/1; 1/1
- Self-mailing vs. personalized cover letter
- Response form , envelope / flap envelope
- Full color vs. two color
- In-house vs. vendor



## Other

- Business card
- Membership renewal
- General letterhead / envelopes
- Legacy letterhead / envelopes
- Postal indicia message
- Legacy society newsletter
- Legacy society survey



## Business Card

- **Free gift planning illustrations**
- **See [www.GiftPlan.org](http://www.GiftPlan.org)**  
*the charitable gift planning web resource*

# Membership Renewal

IF FACING, PLEASE ENTER NAME AND PHONE NUMBER ON THIS SIDE

YOUR NAME: \_\_\_\_\_ PHONE #: \_\_\_\_\_

**STEP 1**

**TOTALING YOUR ORDER**

DO YOU HAVE SPECIAL SEATING REQUESTS?  
Please note that subscribers renewing their Passes have priority to retain their seats.

I have a seat request in available open request.

STEP 1 TOTAL \$	
STEP 2 TOTAL \$	
STEP 3 TOTAL \$	
*REGISTERING SEATING \$	35.00
FEES & SERVICE CHARGES \$	10.00
<b>GRAND TOTAL \$</b>	

Grand total when you have a seat request includes registration fee and on-line registration fee. See all other rules. Online registration or addition of the Single Seat purchase has a per-seat handling fee.

\*We hope you will consider making a gift with your subscription. Your seats cover the cost of our request. The gift will go to our artist-in-residence or to our program. Thank you!

**STEP 2**

**PAYMENT INFORMATION**

CHECK - payable to San Francisco Performances

VISA  MASTERCARD  AMERICAN EXPRESS

INSTALLMENT PLAN (optional): Have your card charged on the set or 1/8th of each month in up to 6 equal installments.

Yes, I would like to pay for my subscription in  
 1  2  3  4 installments  
 on the  1st  15th of each month.  
(Tickets must be paid for in full by September 1, 2012)

ACCOUNT NUMBER: \_\_\_\_\_

SECURE: \_\_\_\_\_

**STEP 3**

**ORDER TODAY!**

Call: 415.398.4339

Mail: San Francisco Performances Box Office  
 900 Sutter Street, Suite 2100  
 San Francisco, CA 94109

Fax: 415.398.4339

Visit: www.sfp.org (There: A Make-Your-Own-Series must be ordered by phone, fax or mail)

**IMPORTANT DEADLINES**

Renewing Subscriber Priority Deadline: MONDAY, MAY 28, 2012  
 Individual Series On Sale: MONDAY, AUGUST 13, 2012  
 Subscription tickets will be mailed in September.  
 Confirmation postcard will be mailed within one week of your order.

**Become a Member**

Donors of \$100 or more receive priority seating and free ticket exchange, even without a subscription. See pages 18 & 19 for details.

Please send information on including San Francisco Performances in my will.

**CONCERT PARTNERS** (see page 19)

YES, I would like to donate \$600 to be a Concert Partner for:


Jonathan Biss, Carey Bell, Mark Padmore and Scott St. John, October 4

Pavel Haas, November 13

Isabel Leonard, mezzo-soprano, March 17

Check with your employer about matching gifts.

Privacy policy: We respect your privacy. We do not share or sell your email or phone numbers with third parties. We also do not sell or share your mailing address with any third parties. We do share your mailing address with other nonprofit arts organizations when their performances are being advertised to you. This may not include working calls, mail or email in any form by simply contacting us.



# Membership Renewal

## Become A Member

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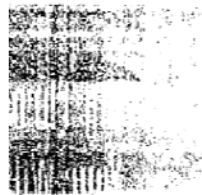
Check with your employer about matching gifts.

## Legacy Letterhead

- Unique logo along with organization's logo
- Used only for those in Society
- Promotional / mission message at bottom



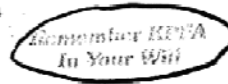
## Postal Indicia Message



1929 Martin Luther King Jr. Way, Berkeley, CA 94704



**KPFA-FM 94.1**



## Legacy Society Newsletter

- 1-2x year
- Survey
- “Save the date” for annual event (if any)
- New members
- Members recruiting members ideas



## Legacy Society Survey

- How are we doing
  - In Honoring you
  - Event(s)
    - Frequency
    - Time of day
- Incentive to recruit others



## Digital

- Web Site
- E-Newsletter
- E-Blasts
- Social Media
- Other



## General

- Links to web site / specific page
- Copy = less is more
- EXCEPTION = compelling testimonial copy
- Timed when appropriate shortly before print communications





## Web Site Basic

- Mission sentence
- Bequests "and other legacy gifts"
- Contact photo, name, phone, email
- Info request
- Tax ID bar / IRS exemption letter (PDF)
- Use short URL for legacy pages



## Web Site Intermediate

- All the above
- Testimonial(s) w/ photos
- Legacy society listing
- Bequest language
- Life income testimonial / basic info sidebar
- "Free and Easy" gifts / very short intro



## Web Site Intermediate

- Internal navigation (buttons, hot text)
- Sign up form (for example, newsletter)
- Video testimonial



## Web Site Advanced

- Same approach as basic + intermediate
- Additional detail
- Remember less = more
- House vs. vendor (tons of options)
- Visitor tracking / rating system



## E-Newsletter

- Broader audience than print version
- Short compelling lead; click for more info
- ~Quarterly in a monthly frequency
- 1-2 x / year in a quarterly frequency



## E-Blasts

- Same audience as print prospects
- 1-4x / year
- Short compelling lead; click for more info



## Social Media

- Facebook / LinkedIn / Twitter / YouTube
- Tied into organization accounts
- Post sparingly
- Monitored, respond to comments
- Compelling testimonial
- Links to web site



## Other

- Email signature message
- Public service announcement



## Telemarketing

- For advanced programs
- In-house add-on to fundraising call
- Outsourced programs available



## In Person

- Suspect Letter & Enclosures
- Seminars
- Qualified Lead Letter & Enclosures
- Confirmed Gift Letter & Enclosures



## Suspect Letter & Enclosures

- Obtain qualified leads one-on-one
- Sent to long term supporters
- Direct version - those you know
- Referral version - those you don't know
- Follow up phone call / voicemail message
- Be prepared for phone legacy ask
- "Will you consider joining society?"



## Seminars

- Greatly diminished in attendance
- Still work for some organizations
- Test for viability
- Second or third tier component



## Qualified Lead Letter & Enclosures

- Communications requests
- "Yes" to legacy ask
- Cover letter
  - Bequest language (or more specific)
  - Legacy society description



## Qualified Lead Letter & Enclosures

- Follow up within 1 week (voicemail OK)
- "Any questions?"
- "May I call back in X months?"



## Confirmed Gift Letter & Enclosures

- Invitation to join legacy society
- Honoring rather than benefits
- Legacy society description
- Enrollment form
- Follow up calls



## Q&A

Greg Lassonde, CFRE  
P.O. Box 27427  
Oakland, CA 94602  
(510) 482-1502  
greg@greglassonde.com  
www.greglassonde.com





## Homework / Next Steps / To-Do

Top 3 (or more) Print Marketing Items to Implement

Top 3 (or more) Digital Marketing Items to Implement

Top 3 (or more) In Person Items to Implement