

Establishing a Planned Giving Program

1. Set goals and timeline
2. Obtain board approval of program implementation, budget and goals
3. Create and obtain approval for gift acceptance, endowment spending and stewardship policies
4. Establish list of planned giving prospects for marketing and personal contact
5. Create a Legacy Society
 - produce materials (Legacy Society brochure, letter of invitation, letter of intent document, bequest language document)
 - create tracking system
 - set acknowledgement procedures for new members
 - select recognition items
 - plan annual gathering or luncheon
6. Create planned giving section on your web site
7. Personally cultivate top planned giving prospects through personal visits, phone calls, letters etc.
8. Implement a print marketing program
 - planned giving newsletters
 - articles and advertisements in organizational materials
 - establish response procedures for incoming inquiries
 - develop collateral materials to send to those who respond
9. Training
 - for staff members • provide training to the board
10. Host on-site education gatherings
 - professional advisor luncheons
 - donor seminars

adapted from: Stelter – Des Moines, IA www.stelter.com