CAPE FLETCHER
ASSOCIATES

Planned Giving | 7 Tips & Tricks

1.) Ask your donors if they've included your organization in their estate plans.

2.) Consider beginning your Planned Giving solicitation process with your Board of Directors first.

3.) Integrate Planned Giving asks into other solicitations such as when you are making an Annual Fund or special campaign request for support.

4.) You do not need to be a subject matter expert on Planned Giving vehicles, instead *you* steward the relationship with the donor and call on CICF, planned giving attorneys or other experts to help determine "how" the gift will be made and in what form. (i.e., CRTs, CLTs, etc.)

5.) Stewardship matters! Integrate your PG stewardship practices into your overall organizational stewardship activities. Do not run separate, parallel stewardship programs.

6.) Create a Planned Giving society in which your Planned Giving members can become active and build relationships with others and with your organization.

7.) You have to make time for Planned Giving…and then make a commitment to actually do it! Do not allow Planned Giving to be an "I'll get to it when I have time" priority.

Let's continue the conversation!
Email or phone us to talk more:

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