

Download Sample Marketing Letter For Planned Giving

Planned Giving Gets Noticed “I was introduced to Tom Ligare and the Legacy Life Giving program over four years ago at its inception. The program was brought to me because of my background in non-profit organizations and my background in marketing for major companies. Letters to Prospects. ... pooled income fund or any other of the more complex planned giving instruments, include sample bequest wording in your response packet. Many donors just kick the tires of the fancier planned giving vehicles before settling on the user-friendly revocable bequest. ... (see Recognition under Presentations in the Marketing ... August • Send out planned giving postcard September • Send out annual giving letter with planned giving twist October • Mail planned giving postcard • Legacy Society event, golf outing, etc. Take pictures and post on your planned giving website. November • Mail year-end giving letter; recommend gifts of securities instead of cash ... “If a tree falls in the forest, and no one is there to hear it...” You know the rest. The most important thing about marketing your planned giving program is to be consistent and diligent about getting the word out. You should plan to include something about planned giving in your library’s marketing materials.