


PG Calc YOUR PARTNER IN PLANNED GIVING SUCCESS



Planned Giving Marketing: What Works, What Doesn't, and What's Next

Date: August 28, 2025
Time: 1:00 – 2:00 Eastern
Presenter: Andrew Palmer
 Senior Director of Marketing Services

1

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How satisfied are you with your current marketing?

- **Mostly/Very satisfied:** ~62% combined
- Dissatisfied / need to do more: ~38%

👉 Most organizations are doing *something* and feel okay about it, but more than **a third admit they're underperforming**. This suggests a significant appetite for *scaling up* and improving.

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What is your most important goal for marketing?

- **Raising awareness:** 38%
- **Donor education:** 31%
- **Lead generation:** 31%

👉 The field isn't driven by one dominant goal. Instead, organizations are split between *awareness/education* and *direct response (leads)*. A balanced is needed.

Tell Me More



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Do you have a written planned giving marketing plan?

- **No written plan: 59%**
- **Yes plan: 41%**

👉 A majority operate without a formalized strategy—indicating room for improvement in disciplined, year-over-year marketing planning.

Schedule	Channel	Theme Gift Type Audience
Apr-May	Postcarding & Postcard	<p>THEME: It's simple to change the future</p> <p>GIFT: Beane Designations</p> <p>AUDIENCE: Donors who are 45+ and have given \$-5 or more gifts in the last 5-7 years.</p> <p>Follow up with email two weeks after mailing</p>

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What is the most important theme you want to convey?

- **Many ways to create a legacy: 39%**
- Impact of a gift: 32%
- Simplicity: 21%
- Tax benefits: 7%

👉 Donor-centered storytelling dominates (legacy & impact). Technical/tax messaging is low priority—confirming a sector-wide shift toward emotion and simplicity over complexity.



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What tactics have you used in your marketing?

- Planned giving website (87%)
- Print newsletters (52%)
- Print Postcards (62%)
- Digital newsletters (55%)
- Donor surveys (31%)
- Social media (30%)

👉 A mix of traditional print-heavy methods with growing—but less dominant—digital usage.



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What tactic has been most AND least effective?

- **Most effective tactics:**
 - Traditional print postcards (30%)
 - Planned giving websites, newsletters, donor surveys, educational events (each ~15%)
- **Least effective tactics:**
 - Social media (29%)

👉 Print still outperforms digital in this field, while social media is seen as the least effective.



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Do you have a legacy society & how do you promote it?

- **Yes: 89% have one**
- Promotion: 52% automatically enroll donors; But only 17% promote the benefits

👉 Legacy societies are well established but **not nearly marketed enough.**



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Which gift types do you promote in your marketing?

- Bequests, IRA rollovers/QCDs, **93%**, Most common
- Complex gifts (CRTs 34%, CGAs 65%, real estate 4%), Less emphasized

👉 Simplicity rules—aligns with donor behavior and earlier messaging trend. **65% market DAFs**




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Which outcomes have you observed from marketing?

- **Top results:**
 - More donor inquiries (58%)
 - Confirmed new planned gifts (58%)
 - Engagement from quiet donors (55%)
- ☀ The programs that are active are producing *direct donor activity and gift confirmations*.



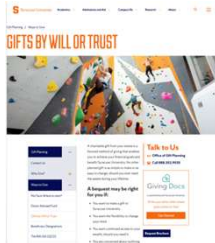
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Do you use separate estate planning tools on your website?

- **67% don't use them**
- **Main barriers:** unclear ROI (28%) and budget (24%)
- **Users:** Mostly FreeWill
- ☀ Adoption is still limited, but perception of value is mixed. Budget and clarity issues prevent wider uptake.




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Size and type of programs surveyed?

- Representation Dominated by Higher Ed (38%)
- 44% are "teams of one"
- 30% have 2–3 staff
- 22% have 5+ staff
- ☀ Most planned giving programs are *lean*—marketing capacity is constrained.



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Advice & Cautionary Tales

- **Donor-centered messaging:** Sell the *impact* and *legacy*, not the product.
- **Consistency matters:** Ongoing communication is key (postcards, newsletters, surveys).
- **Stewardship before marketing:** Don't overpromise without capacity to nurture donors.
- **Surveys & events work:** Especially targeting women and high-net-worth donors.
- **Messaging alignment:** Ensure materials reflect your org's voice, not just vendor boilerplate.

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Key Trends & Takeaways

- **Simplicity + Legacy Language is Winning** → Donors respond best to easy, mission-centered options.
- **Print Outperforms Digital** → Postcards and print newsletters drive the most engagement.
- **Estate Planning Tools Still Emerging** → Budget and ROI concerns limit adoption; Need a new player.
- **Capacity Constraints** → With most teams 1–2 people, outsourcing and vendor support play a big role.
- **Stewardship is Critical** → Marketing without stewardship risks donor trust.

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Your Questions Answered

What is the best way to promote new gift planning website?

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Promote a website

Tell Me More

- 1. Discover what is new in PG Calc
- 2. Learn how to use PG Calc
- 3. Get the latest news and updates
- 4. Find out how to get the most out of PG Calc






Make a Plan — Make an Impact

Organize your estate planning today!

- 1. Review your current estate plan
- 2. Identify your goals and objectives
- 3. Consult with your attorney and accountant
- 4. Review your current estate plan
- 5. Identify your goals and objectives
- 6. Consult with your attorney and accountant
- 7. Review your current estate plan
- 8. Identify your goals and objectives
- 9. Consult with your attorney and accountant
- 10. Review your current estate plan
- 11. Identify your goals and objectives
- 12. Consult with your attorney and accountant




Estate Planning Guide

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Q&A

Where do you start with Social media marketing?


Do you have managed pages or groups related specifically to PG?

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Donor Stories



COLUMBIA IMPACT SOCIETY
Impact Makers

Giving Back, Giving Forward, and Leaving Your Legacy.

When you make a legacy gift to Columbia, you pave the way for future generations to be inspired, feel empowered, and ultimately to flourish. It can completely transform the heights Columbia students, faculty and researchers can reach. Donors are a diverse group with uniquely personal reasons for supporting the university. Explore their stories and experience the impact a single gift can have on the future of Columbia, and the world.


Impact Makers

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Q&A

How effective are planned giving newsletters?

Print and digital

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Q&A

How should we ramp up our messaging when this has traditionally been minimal in our organization?


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20



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Inserts get stuffed



Creating a Legacy at HopeHealth:

Ed Jankowski

When Ed Jankowski's wife, Joyce, was diagnosed with cancer and suffered a stroke, he retired from his career as a federal civil servant to care for her. Throughout Joyce's illness, Ed never left her side, even when they received hospice care at home with HopeHealth. After her death, Ed's HopeHealth grief counselor helped him process his grief. Ed gives monthly to HopeHealth and has made a legacy gift in honor of the care Joyce and he received.

"This is an organization I am proud to support. You can name HopeHealth as a beneficiary of an insurance policy or annuity or give through an IRA distribution. I decided to do all three. My legacy gift will help other families."

If you're interested in discussing a legacy gift to HopeHealth, contact Suzanne Fortner, Chief Philanthropy Officer at (401) 415-4466 or email SFortner@hopehealthca.org

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21

22

23

24

25

26

27

[illegible]

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Make special anniversary gift

CLASS OF 1974

Leave your mark on Loyola

BOTH REUNION GIVING - A MILESTONE GIFT

CELEBRATE YOUR REUNION WITH AN

TO BENEFIT THIS YEAR, ACT BY DECEMBER 31, 2020

START PLANNING NOW

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End of Year Giving

Tell Me More

STRATEGIC GIVING NOW AND FOR THE FUTURE

KEEP REACHING FOR THE STARS

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Q&A

Any suggestions for marketing CGAs, especially DGAs?

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It's why rate charts work...

I want to help save lives and advance care.

QUESTIONS TO ASK YOURSELF:

- 1. Do you have a passion for giving?
- 2. Do you have a passion for giving?
- 3. Do you have a passion for giving?

Regeneron Health Foundation

A GIFT THAT PAYS YOU BACK—Now with Higher Rates!

Make a Gift, Create an Income Stream for Life

Make a gift of appreciated assets to Regeneron Health Foundation, and you'll receive a lifetime income stream of up to 4.5% per year, based on the fair market value of the assets at the time of the gift.

Key Features:

- 100% of the gift is used to support Regeneron's mission.
- No capital gains tax on the gift.
- No gift tax on the gift.
- No income tax on the income stream.
- No estate tax on the gift.
- No probate fees on the gift.
- No loss of control over the gift.
- No loss of control over the income stream.
- No loss of control over the assets.
- No loss of control over the income stream.
- No loss of control over the assets.

Example: If you gift \$100,000 of appreciated assets, you could receive a lifetime income stream of up to \$4,500 per year.

Get the Facts: Visit www.regeneronfoundation.org/gift

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31

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Personalize Marketing with BatchCalcs

Why Use BatchCalcs?

- Individualized Calculations: Deduction, annuity rate, annual payment, tax-free portion, and duration
- Flexible Inputs: Target amounts can vary by donor or be fixed across the mailing
- Output Options: Receive a data file for mail merge
- Add-On Value: Include a Summary of Benefits chart with each illustration

MCPHS UNIVERSITY

From:
To:
From (Company):
To (Company):

Summary of Benefits

At the example, you receive a lifetime income stream of up to 4.5% per year, based on the fair market value of the assets at the time of the gift.

Example: If you gift \$100,000 of appreciated assets, you could receive a lifetime income stream of up to \$4,500 per year.

Get the Facts: Visit www.mcphealthcare.org/gift

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Q&A

Any proven strategies to encourage documentation of Estate Commitments?

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Find intentions

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Be different

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35


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Q&A

How can we optimize emails to best get the attention of our constituents?

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36



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Unlocking Email Open Rates: 12 Subject Line Tips

Create Uniqueness – Give Donors a Reason to Pause

Your donors are constantly bombarded with emails – many of which look, sound, and feel the same. To stand out, your subject line needs to **break the pattern**. When it looks fresh, unexpected, or thought-provoking, it triggers curiosity and encourages the reader to learn more.

In **planned giving**, that means moving beyond the usual phrases like “Planned Giving Update” or “Your Legacy Matters.” While accurate, those lines rarely excite. Instead, give your subject lines a creative twist that invites exploration while still aligning with your message.

Effective example:

Can I pay you for life?

Why it works:

- It’s surprising and a little provocative
- It introduces a benefit (payments for life) without giving too much away
- It frames a charitable gift annuity in an engaging way

Other strong options might include:


- A smarter way to support what you love
- How a gift can pay you back
- Your IRA can do more than retire

Guidelines for success:

- Be bold, but stay true to your audience
- Avoid misleading claims – uniqueness is about interest, not gimmicks
- Test subject lines that feel like a “new idea” or a lesser-known option (e.g., DAFs, beneficiary designations, CGAs)

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Q&A

How does one address planned giving marketing to those that don't understand planned giving?

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38



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What is planned giving anyway?



AND POWERFUL

It is a simple idea, yet a remarkably powerful one:

Education changes lives.

Making a planned gift can change the lives of students, and be one of life's most satisfying experiences.

Learn how a charitable gift, like a bequest to Bennington in your will or making Bennington a beneficiary of your IRA, can reach your personal legacy goals.

Start today by downloading our **FREE** Estate Planning Guide from our new planned giving website at: plannedgiving.bennington.edu/guide

The planning you do today could change the lives of Bennington College students tomorrow. For further information, please contact:

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Email: lgindberg@bennington.edu

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38

39

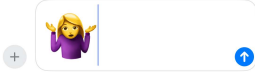
PG Calc YOUR PARTNER IN PLANNED GIVING SUCCESS Q&A

How much is too much planned giving communication?

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How to incorporate AI into our marketing efforts?

In what ways can we use this tool to maximize strategic marketing?

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42

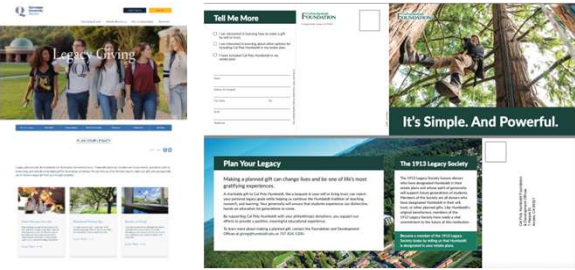
PG Calc YOUR PARTNER IN PLANNED GIVING SUCCESS **Q&A**

What is the most important thing a small shop should focus on with implementing a planned giving program?

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43

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Which types of marketing work best with different age groups?

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Stages of Giving

21-54 Cash, Bequests, Beneficiary designations [simplicity of giving]

55-69 Appreciated securities, DAF, DCGA [retirement]

70+ Retirement assets, CGA, QCD, CRT. [legacy and tax avoidance]

Giving Made Easy

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Support a Cause Close to your Heart

45

46

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Q&A

Would appreciate any advice you have on mailing lists and segmentation of lists?

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47

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Target indicators

The traditional planned giving indicators are:

Primary Planned Giving indicators:

- Frequency of giving

- Longevity

- Age

- No heirs

Secondary indicators:


Cumulative giving

Affinity to Institution

Capacity via wealth screen planned giving scores


48

16



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Questions?



**To ask a question click the
Q&A button at the bottom**

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48
