





Planned Giving Marketing Q&A

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1



Pros and cons

Q: Direct mail vs. email marketing — pros and cons

A: Neither wins alone. Use print for depth and trust; digital for reach and cost. Combining both lifts response rates up to 35%.

Direct mail pros / cons


- PRO: Higher trust and credibility with donors 65+; physical, kept, shared, re-read
- PRO: 3x Higher survey response rates
- CON: Costs; 2–3-week production lead time; harder to track without QR or unique URL

Email and digital pros / cons

- PRO: Pennies per send; instant delivery; A/B testing; better tracking; opens and clicks
- PRO: Easy to repurpose across email and social the same week
- CON: Lower trust for high-stakes asks; inbox competition; deliverability challenges

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2



Mission Marketing

Q: Do you find focusing on Mission/Successes or education more important in mailings?

A: Mission — always lead with mission and/or impact. Donors give to your WHY, not the mechanics of a bequest.

Why mission comes first

- Donors make legacy decisions based on emotional identity, not tax optimization
- The question they are answering: "Does this organization reflect who I am and what I care about?"

How to structure a PG mailing

- Open: vivid story about a specific person helped by your mission — no PG mention yet
- Connect: "You made this possible. Thank you."
- Introduce PG: "Donors like you are also ensuring this work continues long into the future..."
- Offer: "If you have included us in your estate plans, we'd love to hear from you."

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3

PG Calc YOUR PARTNER IN PLANNED GIVING SUCCESS **Digital Marketing**

Q: Are folks still seeing success in a monthly planned giving email blast?

A: Monthly blasts can work but only when content varies meaningfully. A pure monthly PG pitch fatigues donors quickly. For some communities this is too much email.

What works instead

- 4-6 emails/year is the sweet spot for PG audiences
- Space sends 3-4 weeks apart; avoid late Nov and Dec overlap with annual fund
- Rotate: mission story, PG education, never repeat the same ask twice in a row
- A good read will help build a relationship.

Q: What is the magic number of emails before donors get overwhelmed?

A: Varies, but problems arise with the same CTA, and monthly generic impersonal content with no donor connection

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PG Calc YOUR PARTNER IN PLANNED GIVING SUCCESS **Digital Marketing**

Q: Proven email tactics to get opens and responses

A: The biggest gains come from subject lines, for opens and timing, and making emails feel personal rather than mass-produced.

Getting the open

- Subject line: Urgent, Unique, Useful and Ultra-specific.
- From name: "Mary at [Org]" outperforms "[Org] Development Office" Make a personal connection.

Getting the response

- One CTA only — every email has one job.
- P.S. line: When using a letter people read the P.S. even when skimming — put your key ask there.

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5

PG Calc YOUR PARTNER IN PLANNED GIVING SUCCESS **CGA Marketing**

Q: Please address marketing for CGAs (charitable gift annuities)

A: Always lead with mission/impact and the donor benefit — guaranteed income for life — never the acronym or mechanics.

Who to target and how

- Target: donors 70+ with giving history, interest in fixed income, and appreciated assets
- Lead message: "Income for life" resonates far more than "charitable gift annuity" — never lead with the acronym CGA. Best rates in 16 years!!
- Best channels: email + direct mail combo, Facebook/LinkedIn targeting, advisor outreach for referrals
- Add a CGA rate calculator to your website — nothing converts like showing a donor their actual income rate
- Personalized mailing gets the best results: BatchCalcs show rates, payments and deductions, etc.

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6

PG Calc YOUR PARTNER IN PLANNED GIVING SUCCESS **Social Media**

Q: How are nonprofits effectively using social media for planned giving?

A: The most effective organizations use social for awareness and trust-building. Donor stories and impact are your key to success.

What is actually working

- Legacy donor spotlights — short video or graphic of a donor sharing why they included the org
- "Did you know?" single-fact education posts — shareable, low friction
- Event promotion and recap posts — existing members share them
- The wrong channel for gift vehicle education

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7

PG Calc YOUR PARTNER IN PLANNED GIVING SUCCESS **Social Media**

Q: What is the most effective social media platform for PG posts?

A: Facebook first, LinkedIn second. Instagram is a pipeline play for future donors.

Platform rankings

- Facebook has the highest concentration of donors 60+. Boosted posts target by age and estate planning interests.
- LinkedIn #2: Best for CGAs, complex assets, and reaching professionals 45-65 and advisors.
- Instagram: Pipeline builder for under-50 audience — mission and impact only, no hard PG ask.
- YouTube: Evergreen education hub. "How a bequest works" videos live forever. Always add captions.

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8

PG Calc YOUR PARTNER IN PLANNED GIVING SUCCESS **Response Rates**

Q: Are you seeing any changes in PG marketing response rates for socials and email recently?

A: Yes — several meaningful shifts in the past 2-3 years every PG marketer needs to account for.

Key shifts

- Video dramatically outperforms static images across all platforms, even smartphone quality
- Apple Mail Privacy inflated open rates post-2021 — click rate is now the more reliable metric
- Authentic donor video beats polished ad-style creative — real resonates for a life-stage decision

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9

PG Calc YOUR PARTNER IN PLANNED GIVING SUCCESS **Targeted Marketing**

Q: Advice on targeted ads and how to cast a wider net digitally

A: You don't need a large ad budget — you need a precise one. Target the right people, not the most people.

High-impact ad channels

- Facebook/Instagram Ads: target age 55+, homeowners, estate planning interests; upload donor list as Custom Audience
- Google Ad Grants: \$10,000/month in FREE search ads for every 501(c)(3) — apply at google.com/nonprofits [for non healthcare & academic institutions]
- LinkedIn Ads: reaches professionals 45-65 by job title, age, and geography — best for CGAs
- Retargeting: show ads to legacy page visitors who did not fill out a form — very low cost, very warm audience

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10

PG Calc YOUR PARTNER IN PLANNED GIVING SUCCESS **ROI for small ORGs**

Q: What are high-ROI options for orgs with small budgets or limited staff?

A: Internal messaging and a good quality website

Top high-ROI tactics

- Checkboxes on reply envelopes
- Annual reports, newsletters, and magazines
- Acknowledgement buck slip Inserts
- Facebook page
- Letterhead and business card
- Board [Gifts, testimonials and donor stories]

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11

PG Calc YOUR PARTNER IN PLANNED GIVING SUCCESS **ROI on print vs. email**

Q: ROI on print vs. email. What non-cash asset is most worth it to market?

A: IRAs and retirement accounts are the single most valuable and easiest-to-market non-cash gift vehicle.

Non-cash assets ranked

- #1 IRAs (QCDs) and Retirement Accounts: clearest donor tax benefit; heirs pay income tax, charities do not; simple beneficiary form — no will change needed
- #2 Appreciated Stock and Securities: donors avoid capital gains tax; larger gift potential than cash
- #3 DAFs (Donor-Advised Funds): most holders don't know they can name your org as successor beneficiary
- #4 Real Estate: high potential value — requires professional guidance but worth marketing to the right audience

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12

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Finding intentions

Q: What is the best way to get donors who have us in their plans to disclose that?

A: Create multiple passive invitation points. Donors who have already included you need an easy, low-pressure moment to come forward.

Passive disclosure channels

- Reply cards in mailings: *"If you have already included [Org] in your estate plans, we'd be honored to know"* — postage-paid
- Checkbox on online giving forms: *"I have already included [Org] in my estate plans"* — zero friction
- Legacy story invitation: after publishing a story, add *"Have you made a similar decision? We'd love to hear from you"*

Active disclosure

- Gift officer ask at milestones: *"Is there anything we should know about your long-term plans with us?"*
- Personal letter/Mailing: *"If you have honored us with an estate gift, we'd love to thank you personally"*

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13

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Donor Surveys

Q: Best practices for surveys — are they relevant? Mailed vs. email?

A: Donor surveys are absolutely relevant — one of the best PG lead-gen tools. They create a low-pressure moment for donors to self-identify.

Survey best practices

- Traditionally your best response; best combo: mail + email
- Keep surveys short
- In print always include a postage-paid reply card — removing friction doubles response rates

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14

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Donor Surveys

Q: Is there a time of year that works better for PG survey response rates?

A: Yes — timing matters significantly. The best windows align with natural life-planning and financial reflection moments.

Best and worst timing

- BEST — January to March: post-holiday reflection, early tax season mindset, natural planning moment
- OK — July to August: summer distraction, travel, lower engagement across all channels
- AVOID — September to October: End of year giving time
- AVOID — November to December: competing with annual fund, holiday fatigue

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Legacy society Marketing

Q: Should we market to Legacy Society donors to encourage them to consider another legacy gift?

A: Yes. Legacy Society members are your highest-propensity prospects.

The right approach

- Lead with future impact: "Members like you will make X possible for generations after 2040"
- Show the gift in action — connect their existing decision to real current program impact
- Wait 2-3 years before any second gift conversation; stewardship must come first

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Legacy society Benefits

Q: Creative ideas to add value to a legacy society without in-person engagement

A: Many of the highest-value legacy society benefits are digital-first and scale better than in-person events.

Virtual value-add ideas

- Exclusive CEO/Leadership Zoom: quarterly session sharing inside news not seen by general donors
- Behind-the-scenes video updates: 2-5 min monthly videos from program staff, exclusive to members
- Members-only e-newsletter: insider data, impact metrics, and program updates not sent to general donors
- Free estate planning webinar with a local attorney — extremely high perceived value
- Personal milestone outreach: birthday cards and giving anniversary notes from a real person
- Named recognition in digital publications: annual report, impact report, and website Legacy Society page

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17

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Dr. Russell James' verbiage

Q: Is it advisable to use the words '...make a gift in your will' ?

A: Yes — absolutely. "A gift in your will" consistently outperforms all PG jargon in comprehension, resonance, and stated intent to act.

Why it works

- Plain language activates donor identity — they see themselves as "the kind of person who does this"
- "A gift in your will" is universally understood; "bequest" and "planned gift" require mental translation
- Just be consistent

Language swaps

- Instead of "a bequest" use "a gift in your will" or Instead of "a planned gift" use "a gift in your will"
- Instead of "estate planning" use "planning for the future"
- Instead of "charitable remainder trust" use "an arrangement that pays you income for life and then supports us"

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18

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Follow-up Marketing

Q: How important is following up print assets with email versions or social media posts?

A: Very important. 3-channel exposure — print + email + social — increases response rates vs. single channel.

Why repetition works

- Different channels reach the same donor in different contexts and moods
- Print readers who also receive email are more likely to respond because they recognize the content
- Meet donors where they are

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19

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DAF Marketing

Q: Marketing messages to recommend for charities regarding donors' DAFs at other entities

A: Many DAF holders have never been told they can name your org as a successor beneficiary.

The core message and approach

- Core message: *"Did you know your donor-advised fund can become a legacy gift? You can name [Org] as a part of your succession plan of your DAF — no will change, no attorney, just a simple form with your DAF sponsor"*
- Why it works: DAF holders are already philanthropic, already have the vehicle, and the ask is a form change not a will change
- Your legacy page must list DAF as a gift vehicle with step-by-step instructions and your EIN

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20

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Senior Marketing

Q: I've seen articles that say seniors read everything and that they skim. Which is correct?

A: Both are true — it depends on the donors and the channel. Design for skimmers, and reward careful readers.

Read vs. skim by channel

- PRINT: Seniors read print more thoroughly than any other demographic — they set it aside, return to it, re-read it. But they still scan headlines first. Design for skimmers and they will read everything.
- EMAIL: They open email more than assumed. But skimming is primary — front-load the most important message in the first two sentences in your email blast.
- WEB: Significant skimming. Use large fonts (minimum 16pt body), short paragraphs, clear headers. No autoplay video. One clear CTA per page.

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21

PG Calc YOUR PARTNER IN PLANNED GIVING SUCCESS **AI**

Q: Will AI replace my planned giving website?

A: No. AI changes how donors find information — it makes your website more important, not less.

The donor experience is key

- AI can summarize, but donors still need accurate, organization-specific source material. Generic answers never reflect your mission, programs, or gift policies.
- AI may generate attention, but interest is not conversion. Your website continues the conversation — turning anonymous research into identified, ready-to-talk prospects. It's your introduction.
- Engagement tools: Personalized Calculators, Infographics, Quizzes come from your site. Bottom line: AI brings donors to the question — your website brings them back to you.

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22

PG Calc YOUR PARTNER IN PLANNED GIVING SUCCESS **Tracking and reporting**

Q: How should we be tracking and reporting our PG marketing efforts?

A: The biggest gap in PG marketing is tracking. Build measurement in before every campaign launches — not after.


Track by channel

- Email: open rate, click rate, replies, links to disclosure or pledge pages
- Print: QR code scans, unique URL visits, reply card returns, cost per response
- Social: reach, engagement rate, link clicks to legacy page
- Overall Engagement: new legacy donors identified, total disclosed pipeline value, cumulative YOY trend [How many calls, meetings, or gifts can be tracked back to each effort.]

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23

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24

PG Calc FOUNDRY SOURCE YOUR PARTNER IN PLANNED GIVING SUCCESS **Still Have a Question?**

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