

How to Identify Planned Giving Prospects & Get the Conversation Started



How to Identify Planned Giving Prospects

So, you've created your legacy society & collateral, now how are you going to get people in it?

self-identification



Yes, please send me information about making a donation to ABC Charity through my estate plans.

P.S. Have you remembered to support (insert mission) in your estate plans? A bequest to the ABC Charity's Endowment Fund will ensure that future generations (insert mission)! Please call us today to learn more.



Name the Harrisburg Symphony in Your Will

Make us part of your family. A gift through your will or estate is the easiest gift you can make today.

[Learn More >>](#)



Put Your IRA to Work for the Harrisburg Symphony

There's a simple, straightforward way to avoid income tax and potential estate tax on your retirement plan, while making a significant gift to the Harrisburg Symphony.

[Learn More >>](#)



Support the Harrisburg Symphony in Creative Ways

[Gifts Anyone Can Make >>](#)

[Gifts That Pay You Income >>](#)



from your database

Top Factors for Identifying a Good Planned Giving Prospect

- Donor-Nonprofit Connections

- Frequent past donations (especially if they are gradually increasing)
- Volunteerism (especially in multiple capacities)
- Expressed desire to WANT to make a major gift in the future (but inability to do so now)
- Former service recipients (e.g. grateful patients)

- Statistical Information

- Age (older / folks that already have a will)
- Marital status (single or widowed / no spousal beneficiary)
- Children (none or ones that are well off / no child beneficiaries)
- Property ownership (especially real estate that is paid off & appreciated securities)

record everything & become a query master

from existing
donors



How to Earn More Donor Referrals

by Chad Barger, CFRE

productive
FUNDRAISING

Donor Profile

- Attribute 1
- Attribute 2
- Attribute 3





How to Get the Conversation Started

(and eventually ASK for
their support)

ASKING is not what
you think it is ...



Begging=you have the power

Demanding=I have the power

Asking=we have a relationship

@amandapalmer #IFC2016

The focus should
not be on the ASK,
it should be on the
CONNECTION.

It's not how do we
ASK people to give,
it's how do we LET
people give. It's an
INVITATION.

What's the best
way to extend that
invitation?

**PEOPLE GIVE TO PEOPLE
(NOT EMAILS)**



THE ASKING PROCESS:

1. Getting the Visit
2. Guiding the Conversation
3. The Transition
4. Positioning the Ask
5. Closing the Meeting
6. Follow Up

getting the visit





Dear Mr. Donor -

I hope all is well and that you're enjoying these late spring days!

My name is Chad Barger and I am the Development Director of the ABC Charity.

I am writing to see if I could stop by sometime in the next month or so to provide a **brief** update on ABC Charity. I like to do this with as many of our supporters as possible each year. It's an opportunity for me to share our progress, to answer your questions and to **get some feedback** which is always appreciated.

I think **20 minutes** would be sufficient – is there a good day on your calendar? Lunch or coffee is also a possibility if you have a bit more time. **What about the 20th at 2pm or the 22nd between 1 and 4pm?**

Also, please know that while it is my hope that you will continue supporting our cause, at this time I'd just like to meet you and provide this update – **I will not be asking for any money!**

Thank you for taking the time to read this request and have a wonderful day.

Sincerely, Chad



4 types of visits

1. impact visit
2. advice visit
3. hear your story visit
4. sounding board visit

guiding the
conversation

My thesis is
Story...





*Ask
open-ended
questions*







Small talk

KNOW | LIKE | TRUST

the transition

Chad's Favorite Donor Visit Questions

- What first led you to become involved with our organization?
- What excites you about our current programming?
- What could we be doing better?
- Can you tell me more?

positioning the ask

no asks on
first visits with
people you don't
already know well

Remember, we're
not **ASKING** them
to give, we're
LETTING them give

The easiest way to
make an ASK ...

**CONSIDER &
JOIN ME**

“I hope you’ll
CONSIDER JOINING
ME in including ABC
charity in your will.”



closing the meeting



Small talk

KNOW | LIKE | TRUST

GET
PERMISSION

follow up

What's Next?

① More information

② Proposal / offer

③ Follow up call / meeting

**GET
PERMISSION AT
THE MEETING**

But what do you need
to do before you follow
up with your planned
next step?



Thank you ...

VANCE -

THANKS AGAIN FOR TAKING
THIS TIME TO MEET WITH
ME THIS WEEK. I'M CONFIDENT
THAT BY WORKING TOGETHER WE
CAN BOTH INCREASE OUR IMPACT
ON THE LOCAL ARTS SCENE. I
GREATLY APPRECIATE YOUR
DEDICATION TO
THE CAUSE!

THANKS AGAIN,
CHAD

Follow up guidelines: 4x

1 week after the ask

2 weeks after that

4 weeks after that

8 weeks after that

Move on (after 15 weeks)



The End!

productivefundraising.com/resources



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