

# THE "4 I'S" OF PLANNED GIVING

Planned giving is very much in the spirit of Nebraska's agricultural roots. Both involve planting seeds now with the expectation of a harvest later. "Planned giving" refers to the practice of arranging a charitable gift now that will be realized at a future date. This type of giving has become an integral part of endowment building in the Nebraska Community Foundation network.

After over 25 years of helping generous Nebraskans arrange their own planned gifts and assisting our volunteers in asking their friends and neighbors to do the same, we like to think we've learned a few things. In our experience, there are four key guidelines to remember when it comes to encouraging and asking others to consider making their own planned gift to benefit the communities and causes they care about most.



## 1. IDENTIFY

The identification of potential donors is a never-ending process.

*Remember: It's better to be a good prospector than a good closer.*

### Suggested Champion Activities:

- Ensure your FAC's fund development plan includes specific planned giving goals based on activities that you can control.
- Partner with your Affiliated Fund Coordinator and FAC to identify strong planned giving prospects. This could include FAC members, volunteers, or repeat donors.
- Organize your FAC to more fully engage with planned giving using tools like [www.fivetothrivene.org](http://www.fivetothrivene.org) and the Transfer of Wealth Toolkit.



## 2. INFORM

Develop strategies that draw potential donors into the life of your affiliated fund and educate them about your mission, vision and great work.

*Remember: You never know what someone is thinking until you have a conversation with them.*

### Suggested Champion Activities:

- Tell your story of why you made a planned gift and advocate for telling stories on the impact of planned giving in your affiliated fund's marketing materials.
- Organize educational events that appeal to community members on the role and vision of your affiliated fund and the power of planned giving and tools available.
- Develop relationships with local professional advisors to inform them of the impact of your affiliated fund.
- Gather emails from prospects, professional advisors and FAC members who are interested in receiving occasional electronic updates on planned giving.



### 3. INVITE

Proper solicitation requires discussion, research and development of personalized strategies.

*Remember: Very few people take action without being asked – ASK to GET.*

#### Suggested Champion Activities:

- Raise awareness of planned giving, invite community members to make planned gifts and recognize donors within NCF's Hometown Legacy Society.
- Create opportunities in your day-to-day life to enter into conversations regarding the power of planned giving and why you made a planned gift.
- Help other FAC members feel comfortable discussing the power of planned giving. This may mean inviting them to make their own planned gifts and partnering with them as they go on "asks."
- Make sure local professional advisors have affiliated fund materials, such as your brochure, annual report and "10 Tools for Charitable Gift Planning."



### 4. I APPRECIATE

Donors want acknowledgement of their gift. Reassurance that their gift will be used as designated. Evidence that their gift is being used as designated before asking for another gift. Communication is the essence of appreciation.

*Remember: Do not confuse appreciation with recognition°.*

#### Suggested Champion Activities:

- Maintain relationships with donors that have made planned gifts.
- Continually consider how you, your FAC, and your community can celebrate and thank those who make planned gifts.
- Thank and recognize professional advisors that have helped clients make a planned gift.