

5 TO THRIVE PLANNED GIVING CAMPAIGN



PREPARATION

- Communications and marketing
 - › Newsletters
 - › FAC website
- FAC training
- Identify prospects
- ToW presentations
- Professional advisor workshops
- Gathering events
- Estate planning workshops
- Personal visits
 - › Right person
 - › Right time

FOLLOW UP

- Print pieces
- Phone calls
- Referrals
 - › NCF staff
 - › Professional advisors
- Finalize:
 - › Letter of Acknowledgment
 - › Fund/Account agreements
- Outcome reports
- Stewardship steps
- Celebration event
 - › Include Legacy Society members

Personalized Invitations

THE INVITATION

"Would you consider . . ."

PASSIVE → ACTIVE



1. "Yes"
2. "No"
3. "Maybe"

Beginning Steps:

1. Set goals for # and \$ of planned gifts
2. Define timeline for campaign