



PLANNED GIVING CAMPAIGN AVAILABLE RESOURCES

| RESOURCE | DESCRIPTION |
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| Communications and Marketing Support | NCF's communications staff can provide an abundance of planned giving marketing materials and even assist your fund in developing custom, localized messaging and materials that will give you confidence in donor discussions. |
| FAC Training | Every FAC has different needs. Have you been able to identify your top planned giving prospects? Would you like ideas for making the planned giving ask? Would you like to understand the different planned giving options available to donors? NCF staff can provide training that fits your FAC. |
| Prospect Identification | Everyone is a planned giving prospect, but you want to spend your time with those most likely to make a gift. NCF staff can help you construct a "Bullseye" to identify your top planned giving prospects. |
| Planned Giving Events Manual | Raising awareness of planned giving opportunities is crucial. NCF has created a manual with detailed instructions on conducting Professional Advisor Workshops for attorneys, accountants and other professional advisors. Gathering Events, which provide opportunity for you to invite interested individuals to learn about planned giving in a comfortable environment, are also covered. |
| Invitation Packet | The most important part of the planned giving process is visiting with your friends and neighbors and asking them to consider a planned gift. An important element of the ask is sharing written materials explaining what you're asking them to consider. NCF staff can provide customized proposals for you to leave with your donors. |

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| Script for Making the Ask | During the planned giving ask, what should you say and how do you respond to questions? NCF has created a script that helps guide the conversation and gives you confidence in any situation. |
| Referrals | There may be times the donor wants more information and would benefit from a detailed planned giving conversation about the available options. NCF planned giving staff are available to meet individually with donors about their specific questions. |
| Letter of Acknowledgement | Documenting the donor's planned gift to ensure their wishes are fulfilled is a necessary step in the process. This easy-to-complete form also invites the donor to join the Legacy Society as a way to thank them for their gift. |
| Outcome Reports | NCF staff will prepare regular reports to help your FAC track the planned giving prospects in your pipeline and provide a snapshot of your progress toward goals. |
| Stewardship | Acknowledging planned gifts and thanking donors is the final step in the planned giving process. NCF can provide a donor recognition gift to be presented by your FAC. If the donor is willing to share their story, NCF staff are available to write a narrative to inspire others to consider a planned gift. |