



# There's No Secret:

## It's Common Sense Planned Giving.

*A* fundraiser recently asked me whether she should do “research-based planned giving” – some popular buzz-words you may have heard. “What are the stats these days?” she asked. “Any new research?”

Sure, we can always do research. But I'd like to know what the urgent questions are about planned giving that we need this additional research to answer.

Are our donors going to die? Will the government get a substantial portion of their assets if they don't make other arrangements? At what age do they stop giving?

Seems to me we already know the answers to these questions – and many others as well.

*Why precisely, then, do we require all this further academic study, metrics, and micro-dissection of what we already know?*

The answer is **no secret**: We don't require more research. All we need is ...

### **Common Sense.**

We already know that we offer something our prospects need: proven ways to maximize their tax savings while benefiting the causes they care most deeply about. And the real work – the “doing” of our profession – is promoting planned gifts.

Selling more research to produce more statistics is

something somebody else gets paid for. Mark Twain once commented, “People commonly use statistics like a drunk uses a lamp post; for support rather than illumination.”

*Calling for research is a way of avoiding what you know you need to do:* just start promoting (the “doing”) planned gifts instead of pondering (the “collecting of endless stats”). It's simple.

### **Dithering Never Closed a Gift**

Not much real change has occurred in planned giving in the last 10 years. Those that claim that “significant new trends” exist – and that you should pay a consultant to find out what they are and what they might mean – are just broadcasting what you might politely call natural fertilizer.

Indulging in research is an expensive diversion from making real progress. Because there are many simple and inexpensive ways you can promote planned gifts right now.

For example, how many times have you heard, “I'm living on a fixed income,” or “We don't have enough cash to make a gift”? Your reply beings with ...

### **The Simple Planned Gift**

How do you present planned gifts to appeal best to your average donors? It's easy. Begin with the less compli-

cated gifts that anyone can afford – the “no hassle” gifts that don’t impinge on prospects’ lifestyles and require little or no professional advice.

These gifts make up over 80% of all planned gifts and are inexpensive and easy to market (you can find language to market them at [PlannedGiving.Com](http://PlannedGiving.Com)). Such gifts include:

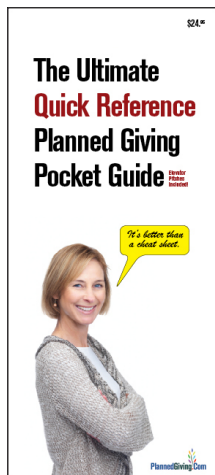
- **Bequests:** Drafting a will is a simple process; many people do it; and bequests offer many advantages. Keep your loyal donors focused on how easy it can be to lock in these benefits.
- **Appreciated Assets:** Many assets that grow over time provide very little cash flow. A large gift to your charity may cost the donor very little income, and funding a gift annuity with that asset should increase the donor’s income. In addition, donating assets that cost money to maintain, like real estate, coupled with receiving a deduction, could be very appealing.

- **Retirement Plans:** Encourage donors to name your charity as the beneficiary, which won’t cost them anything while they’re alive. Besides, these are taxed heavily if passed on to heirs.

- **Life Insurance:** Another “no hassle, no cost” gift.

Basically, regardless of the calls for more research to pry into the supposed intricacies of the planned giving market, it’s not rocket science. It’s not esoteric, and it’s not complicated. In fact, the approach to promoting your planned gifts that works best is the simple – and inexpensive – one. It’s the one you can undertake right away with smart marketing that sells the sizzle.

It’s no secret.



Every fundraiser needs this book. Visit [PlannedGiving.Com](http://PlannedGiving.Com) for more information.

  
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