

# The Dos and Don'ts of Planned Giving Appeals for Estate Gifts

## Introduction

Estate gifts, also known as planned or legacy gifts, are a vital component of many nonprofits' fundraising strategies. These gifts can significantly impact an organization's financial sustainability and long-term success. However, soliciting estate gifts requires a delicate and thoughtful approach to ensure that donors feel respected, valued, and inspired. Here are some essential Dos and Don'ts to guide your nonprofit's fundraising and planned giving efforts.

## Dos for Estate Gift Appeals

### 1. Build Genuine Relationships

*Do:* Prioritize building authentic relationships with your donors long before discussing estate gifts. Understand their passions, values, and connection to your cause. When donors feel truly connected to your mission, they are more likely to consider making a legacy gift.

### 2. Educate, Don't Pressure

*Do:* Educate donors about the importance of estate gifts and how they can leave a lasting impact. Provide clear and informative materials about planned giving options, but avoid applying pressure. The decision to make an estate gift should be made thoughtfully and without undue influence.

### 3. Communicate the Impact

*Do:* Share stories of how estate gifts have transformed your organization and benefited your mission. Illustrate the tangible impact of legacy gifts on the

communities or causes you serve. Donors are more likely to consider an estate gift when they can see the meaningful difference it will make. Make storytelling a key part of your marketing plan.

#### 4. Offer Professional Guidance

*Do:* Encourage donors to seek professional advice from financial planners, attorneys, or tax advisors when considering an estate gift. Providing a list of recommended professionals or offering educational seminars on estate planning can demonstrate your commitment to their financial well-being.

#### 5. Recognize and Thank Legacy Donors

*Do:* Establish a legacy society or recognition program to honor donors who include your organization in their estate plans. Publicly acknowledging their generosity (with their permission) can inspire others to consider similar gifts while strengthening your relationship with the donor.

## Don'ts for Estate Gift Appeals

### 1. Never Be Overly Aggressive

*Don't:* Pushing donors to make an estate gift can lead to discomfort and may damage the relationship. Instead, focus on gentle encouragement and allow donors to make decisions at their own pace. Avoid aggressive or insensitive solicitation tactics.

### 2. Ignore Stewardship at Your Peril

*Don't:* Failing to maintain ongoing communication and stewardship with legacy donors is a **critical mistake**. Regularly update them on your organization's progress and express gratitude for their future gift. Neglecting these relationships can lead to donor disengagement, and even the loss of gifts.

### 3. Wealth Does Not Equal Interest

*Don't:* Assuming that only wealthy donors are interested in making an estate gift is a common misconception. Every donor is unique, and their philanthropic interests may vary. Quite often, the largest bequests come from consistent annual donors

who never appear on any wealth rankings. Approach each donor with an open mind and tailor your conversations to their specific motivations and values.

#### **4. Complicated Language Drives Away Donors**

*Don't:* Legal jargon and overly complex language can be intimidating and confusing for donors. Instead, use clear, simple, and accessible language when discussing planned giving options. Your goal is to make the process as straightforward as possible for potential donors. Talk about leaving legacies and making gifts that provide income, not structuring DAFs and establishing CRATs.

#### **5. Forgetting to Personalize Diminishes Engagement**

*Don't:* Sending generic, one-size-fits-all planned giving appeals is a recipe for failure. Personalization is key in estate gift fundraising. Tailor your messaging to reflect the donor's relationship with your organization, their interests, and their past contributions for maximum engagement.

### **Conclusion**

Fundraising for estate gifts requires a careful balance of respect, education, and relationship-building. By following these Dos and Don'ts, your nonprofit can create a planned giving program that resonates with donors and secures the legacy gifts that will sustain your mission for years to come.