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# Planned Giving. More Than Just Money.

Are you a legitimate charity?  
Perhaps only on paper. Read on ...

Everyone focuses on the importance of planned giving from a financial perspective.

## **Pfui.**

My focus is more from a critical marketing perspective. Why? Because we're in the planned giving *marketing* business.

So the question remains: Why does your organization need a planned giving program?

The boring and most-used answer is that planned giving is invaluable to an establishment's financial health... blah, blah

... largest intergenerational wealth transfer ... blah, blah ... more than \$30 trillion will pass from Baby Boomers ... blah, blah.

## **Enough Already. We. Got. It.**

The true answer is that if your organization doesn't have a planned giving program, it's not taken seriously. *You* are not taken seriously. You're seen as not planning for the future.

So ... *Why donate to an organization that's not planning?*

## **People See It. And Do Not Like It.**

Consider a different question, then: Why isn't your organization taking planned giving seriously?

## **A Sign of Legitimacy**

Planned giving is a hallmark of legitimate, prestigious organizations that are serious about achieving goals. Donors want to ensure their money goes to a

successful nonprofit. The savviest donors are well aware of planned giving options — and they'll check them out before supporting a cause.

If you don't have a planned giving program, you're losing prospects. Period.

## **Variety is the Spice of Funding**

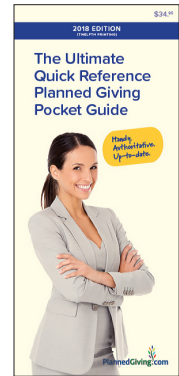
No two donors are alike. A program that's a perfect match for one might not work for another. Organizations with versatile planned giving options get more gifts from a wider variety of donors.

More donors = more funding.

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**YOU DON'T SEEM  
LEGITIMATE IF YOU  
ARE NOT MARKETING  
PLANNED GIFTS.**

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## Bigger Gifts

Only 5 percent of the nation's wealth is in liquid assets. The rest is where planned giving comes into play: retirement plans, real estate — even collectibles. Planned gifts are usually a donor's largest gift to an organization. Are you happy just receiving one-time gifts of \$5, \$10, or \$200? Then you're in the wrong business.

## Easy to Give and Receive

People will appreciate you more, because it shows you care. It's not rocket science. Planned gifts are easy to market, easy to give, and easy to receive. Especially beneficiary designations.

## Accessible to All

The majority of donors aren't wealthy. Studies have found most gifts come from poor and middle-class donors. A donor may not be able to contribute anything right now, but through planned giving can offer a large amount in the future. Again, this shows you care.

## Builds Relationships

Fundraising is about relationships, and relationships are built on trust. A planned giving program helps establish that trust — and helps fundraisers cultivate more opportunities for giving. Just like businesses, charities are built on repeat "customers." What's in a relationship? Marketing and sales. Did we mention marketing?

## Allows Donors to Leave a Legacy

Donors don't give just to help a cause — they give because it makes them feel good.

Planned giving is a way for anyone to leave a legacy (i.e., feeling good), and that appeals to everyone — whether they get a hospital wing named in their honor or make it

into a nonprofit's newsletter.

In a way, planned giving is a gift you give to a donor.

And making people feel good is a major part of marketing and sales. 🤝

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**ALLOWS PEOPLE TO  
LEAVE A LEGACY.  
NOW THAT'S  
SOMETHING YOU CAN  
TAKE WITH YOU.**

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**PLANNED GIVING IS A PEOPLE BUSINESS.  
NOT A LEGAL BUSINESS.™**

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I hope you found this white paper stimulating and useful.

My mission is to make available to you the best know-how, insight, and tools so you can keep yourself, your career, and your organization permanently ahead of the curve.

Contact me. Let me know how you're doing. And let me know how I'm doing.

Let's improve and succeed together.

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