



Purpose	Planned Giving in a Box™ contains everything you need: <ol style="list-style-type: none"> 1. Begin a new planned giving program, 2. Strengthen an existing program 3. Formalize systems (gift acceptance policies, gift counting guidelines) 	Quickly gain credibility and get in the game with zero effort. Establish an online presence and provide materials for your staff. Send out your basic solicitation letters. When you're ready, it's an easy upgrade to Planned Giving in a Box™. Planned Giving Express™ is your critical pathway for board approval.
Who It's For	Small to medium-sized shop that's ready to establish a planned giving program or strengthen an existing one.	For shops that are budget conscious and/or understaffed to develop a planned giving presence — online and in print.
Commitment Required	One to two hours a week, for 52 weeks.	1 – 3 hours total; we do the rest.
Level of Expertise	Little experience in development	None required.
Planned Giving Website	A solid review of Beneficiary Designations with gift plan options suitable for your program	A planned giving microsite with videos of various gift plans and their summary.
Customization of Website	Yes, with most of your branding	No branding. Only logo, organization name and contact information
Marketing and Outreach	Comprehensive: templates and artwork. Solicitation letters, brochure templates, postcards, thank you letters, and much, much more.	Basic (two solicitation letters; ways-of-giving brochure template).
Staff Education	3 versions of pocket guides, 3 copies of each.	1 version of pocket guide, 1 copy.
Tools and Forms	Over 60 forms, including gift acceptance policy template and sample gift counting guidelines. Includes 12-Month Marketing Calendar.	12-Month Marketing Calendar.
Implementation	Step-by-step process with a proven methodology; outside resources include a designer and/or a print shop. All content and templates are provided.	An Off-the-Shelf solution with minor effort. Needed resources include a designer and/or print shop for the ways-of-giving brochure template (included).
Investment	\$4,495	\$595
Per year for website	\$0 for 3 years; \$795/yr annual renewal option thereafter.	\$495 per year annual renewal option.