

PG Tip from Leave A Legacy® - Planned Giving Resolutions for 2008 (December 2007)

Dear Leave A Legacy® Partner:

Hopefully, everyone is about to wrap up a fabulously successful 2007! Fundraising is hard work. But it's also important work. Thank you for everything you're doing to strengthen our community.

This month's Leave A Legacy® tip is a suggestion – specifically, to make (at least) one New Year's resolution that relates to planned giving. In fairness, we all have many legitimate demands placed upon our time, some with more urgency than others. Annual support is critical. Events have their natural deadlines. Our managers, staff and co-workers need information and support. Against this backdrop, planned gift fundraising can be put off far too easily until next week, or next month, or next year.

Well, next year is almost here.

Here are a few suggested PG resolutions to consider:

1. Make certain that all direct mail coupons, reply envelopes, etc, have a check-off box for people to indicate their interest in a planned gift, or tell you they've made one. When do you reorder these materials? Is it time to update their design?
2. Talk to one person every month about a planned gift. Even if it's asking a simple question like, "Could I send you a brochure that talks about remembering non-profit organizations (or your organization, specifically) in your estate plan?" Schedule it in your planner. Write it down on the 1st of every month. See how many months you mention it to someone.
3. Commit to a PG article in each issue of your newsletter. Use the Leave A Legacy® materials we provide. Even if it's a few simple sentences inside a shaded box, it's important to consistently remind people of this option. What is your newsletter's production schedule? Add it to your calendar.
4. (Slightly) self-serving suggestion: Attend more CPGR events. The Brown Bag luncheons are great educational opportunities for those newer to planned giving, while the Quarterly Programs typically (but not always) provide more technical information. The Summer Symposium is the best regional conference in the country. Attend and network with others – we're all somewhere on the PG learning curve. Please visit the CPGR website at [www.cpgr.org](http://www.cpgr.org) and add these dates to your calendar.
5. Finally, relax about planned giving. It's got its complicated parts, for sure, but in the end it's just another way for people who care to give their support. Since most donors cannot make large lifetime gifts (who can predict their future financial needs?), a planned gift allows someone to make a significant gift AND protect themselves along the way.

Hopefully, one or more of these 'suggestions' will be worthy of becoming a 'resolution' for you. Again, please don't put it off until next year.

As always, feel free to contact us with any ideas or suggestions to help us better serve you. In the meantime, thank you again for all of your work, and please accept our very best wishes for a wonderful Holiday Season!

Cheers,

Your Leave A Legacy® Committee  
Colorado Planned Giving Roundtable  
(303)932-6168  
[cpgr@msn.com](mailto:cpgr@msn.com)

P.S. Update: We're still working with YourHub.com to publicize Leave A Legacy® across the Denver Metro area. Please stay tuned