

Subject Line: PG Tip from Leave A Legacy® - 2008 Planned Giving Resolutions: Part Deux (February 2008)

Dear Leave A Legacy® Partner:

With all apologies to bad Charlie Sheen movies, it's that time of year again. Valentine's Day is fast approaching, the days are growing longer and, for many of us, our New Year's resolutions are but a distant memory. Some of us, however, have made progress towards these resolutions – or at least we're still preserving the illusion that we'll engage them soon.

Next week, perhaps.

Or the week after that. At the very latest.

In late December, your Leave A Legacy® Committee sent a list of five potential Planned Giving resolutions for the New Year. These were intended as easy, low-impact ways to incorporate PG into your fundraising efforts. You were invited to make a resolution to implement (at least) one of these suggestions. Asking for a quick show of hands, how many of you have built one of those ideas into your practice?

Well, on the off-chance that a few folks did not raise their hands, please consider the following 'refresher' questions:

1. Have you added PG check-off boxes on your direct mail coupons, reply envelopes, etc? You should have a box to request PG information and one to indicate an estate gift for your organization.
2. Did you talk to one person in January about an estate gift? If not, who would be the best person to speak with in the next 30 days?
3. Are you putting a Leave A Legacy ad in your upcoming newsletter? The Leave A Legacy materials are available for use. For free, even.
4. Have you attended a CPGR Program or Brown Bag Event recently? They always provide interesting ideas, suggestions, tips, contacts, a few smiles, an excuse to get out of the office, and the opportunity to grab unhealthy fast-food along the way, endangering yet another New Year's resolution.
5. Are you convinced that Planned Giving is too complicated? Well, not necessarily. Most planned gifts are simple bequests or beneficiary designations. By emphasizing these straight-forward options, you can tap into the vast majority of estate gifts that occur.

All too often, Planned Giving falls into that 'important-but-not-necessarily-urgent' category of To Do items. In a way, the whole New Year's resolutions concept is an attempt to overlay some sense of urgency or commitment to things we know we should be doing, but are easily sidetracked. Hopefully, this reminder will help you bring a sense of urgency to this work. It really is important for your organization. Sometimes, it's transformational.

As always, please feel free to contact us with any ideas or suggestions that might help us serve you better. After all, we are your Leave A Legacy® committee. Guide us well.

Best wishes to everyone for a happy and successful 2008!

Cheers,

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P.S. We're still making progress towards positioning the Leave A Legacy effort in the 'YourHub' section of the Denver Post. An update will be sent shortly.