

PG Tip from Leave A Legacy - Planned Giving Resources (June 2008)

Dear Leave A Legacy® Partner:

With summer in full swing and your planned giving prospects (hopefully) in full bloom, we wanted to share a few resources that may prove helpful. Specifically, these are links that a prospective donor can use to find objective information about charitable estate planning.

For most prospects, a planned giving decision involves thinking about one's own mortality (always fun!), reflecting upon family relationships (and their highs and lows), becoming well-enough educated in estate planning issues to make appropriate choices (please pass the remote), and then writing checks to pay for the new plan.

Aside from the obvious opportunities for procrastination, it can also be difficult for people to find information from anyone except those ready to benefit from a planned gift, including (potentially) the charity, attorney, CPA, bank trust officer, financial planner, life insurance sales person, real estate agent, etc. Against this backdrop, the lack of helpful (read: 'independent') donor information can become yet another reason for procrastination.

For those of you looking for ways to help your prospects, you might consider sharing links available through the Leave A Legacy® website, specifically those from the donor track <http://cpgr.org/lal/donors.htm>. Here you will find a series of articles that address Planned Giving from a donor's perspective.

For example, why make a charitable estate gift? http://cpgr.org/lal/donors_why_give.htm

How should a person make this gift? <http://cpgr.org/lal/docs/HowToGiveToCharity-V3.pdf>

What are the advantages of a bequest? <http://cpgr.org/lal/docs/ValueoftheBequest.pdf>

What are reasonable donor expectations? http://cpgr.org/lal/donors_expectations.htm

Sharing these links (either all at once or, perhaps, over time) can be a helpful way to stay in contact with your planned giving prospects. More importantly, they may help people reach good decisions about their gifts.

As always, best of luck! Fundraisers aren't always as appreciated for their efforts as perhaps they should be, but we're offering a very hearty 'Thank You' for your efforts. In very real ways, your work will touch the lives of people you may never meet, strengthening the communities that we all share.

Sincerely,

Your Leave A Legacy Committee
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P.S. How are we doing? Please drop us a note with any suggestions or ideas for improvement. We're here to serve you.