

PG Tip from Leave A Legacy® - A Planned Giving Program on One Hour Per Week (May 2008)

Dear Leave A Legacy® Partner:

The sun is shining, spring is in the air, and our best planned giving prospects are wondering why they've not yet heard from you.

Well, okay, maybe not. But spring IS traditionally the most active time of year for estate planning. Perhaps it's the warming temperatures, or nature's rebirth, but more estate planning occurs during spring than any other season. As such, it's a great time to set a couple PG goals.

Many of you attended the recent Brown Bag presentation by Dan Harris, entitled "A Planned Giving Program on One Hour Per Week." An important part of this session was Dan's list of 30+ one-hour ideas for jump-starting (and improving) your PG efforts. The very first suggestion was to create a PG notebook, in which to save articles, notes, presentation outlines, etc, for future reference. By creating this notebook you become your own 'caretaker' of PG knowledge, building an informal collection of educational materials. Interestingly, the very decision to start a binder strengthens your focus on planned giving – which can be just as important as the material collected along the way. But how many of you have such a notebook? If you do, great. If you don't, why not take a moment to find a good 3" binder, a set of dividers, and a label that reads "Planned Giving." It's a simple and great first step!

Switching to your marketing efforts, now could be a great time to speak with any current PG prospects (all else being equal), just to see if they've given any thought to an estate gift since you last touched base. Maybe they haven't, but maybe they have. Either way, it's good to keep the topic alive. It's also a good time to broach the subject with people that you're visiting. Let them know that you're giving more attention to estate gifts to help strengthen the future of your organization. No hard sell. Just awareness. Try it a few times to see how it goes.

Other good 'one-hour ideas' from Dan's presentation include:

- Review the Leave A Legacy® disc and make a short list of ideas for using the material. Don't have the disc? Contact Tina at cpgr@msn.com and request one!
- Create a simple ad for your next newsletter (using the Leave A Legacy® template, if appropriate)
- Make a short list of top donors, ten perhaps, that you think would be good prospects for a planned gift
- Visit Colorado Leave A Legacy® at www.LeaveALegacy-Colorado.org. Print something for your binder.
- Call an existing PG Donor. Ask how/when/why they decided to make an estate gift. Say "thanks" again.

Mostly, though, have fun. Take a few key steps in the right direction and don't worry about how BIG planned giving can sometimes feel. In the end, it's always about the connections you make with people. These tools can help, but spring is a great time to visit with people. Good luck!

Finally, thanks again for your efforts to spread the Leave A Legacy® message within your circles of influence. After all, the more awareness we build around estate giving, the more our organizations and communities will ultimately benefit.

Sincerely,

Your Leave A Legacy® Committee
Colorado Planned Giving Roundtable
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P.S. We hope you're still enjoying these (mostly) monthly blast email messages, and please offer any ideas for improvement, suggested topics, etc. We really want these to support your efforts as much as possible.