

# Special Report



2010

## The Future of Planned Giving

### The Top Ten Challenges Every Long-Term Nonprofit Faces

**A Special Report for Nonprofit Presidents, Development Professionals and Board Members**

Faced with a tough economic crisis and rapidly shifting donor attitudes, nonprofits are struggling to maintain viability and secure permanence, stability and strength. In this report, we will uncover the top 10 challenges to the most important component of endowment strength and stability—planned giving. We will also discover the one global, seismic shift in approach that can keep planned giving on the track for long-term success. In nearly two decades of assisting nonprofits in the arena of planned giving, two important foundational truths remain unchanged:

- Endowments are critical for the health of every long-term nonprofit
- Proactive planned giving is essential to a strong endowment.

Problematically, many nonprofits are struggling to maintain a strong, sustainable planned giving model. Urgent financial needs and short-term organizational goals often compete with the long-term nature of planned giving. Leadership must face these issues with courage, conviction and commitment.

### A Personal Message

If you are reading this report, you are experiencing the weight of those challenges facing every nonprofit organization positioned for the long term, and you are looking for insights and answers. This Special Report is designed to provide both.

Vibrant giving programs are essential to the multigenerational viability of nonprofits, and healthy endowments are the foundation for the sustained health of every nonprofit that anticipates future needs. It is no longer possible (if it ever has been) to maintain vibrant giving or a healthy endowment without a sustainable, proactive planned giving program.

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THE DONOR  
**MOTIVATION**  
PROGRAM™  
We Motivate Planned Giving!

Charities and their endowments face their stiffest challenges and the answers are no longer found in the past—the donor landscape has changed permanently.