

goals discovered, explored



Many organizations continually find it a challenge to pursue planned gifts while meeting their current fundraising needs. Often, planned giving does not receive the resources needed to expand.

Non-profits large and small need the stability of a substantial endowment. Since most endowment gifts come through planned giving, careful planning and proper preparation are necessary to ensure success.

Statistics state that the average person is exposed to approximately 3,000 marketing messages per day. Donors create filters and barriers to address this overwhelming flood of information.

Does your organization have a dynamic message and a solid plan to implement it?

Current donors are your organization's best asset. Care must be taken in nurturing them for sustained, long-term support. Organizations often fail to communicate in a donor-centric way.

How does your organization address a donor's planning concerns?

There are approximately 1,500,000 non-profit organizations in the United States today.

How does your organization distinguish itself and its charitable purpose?

Planned Giving Strategies provides flexible options, giving non-profits access to cost-effective consulting services. It all begins with a Planned Giving Design Review—

From a fresh perspective, we review your current or intended planned giving program to observe, listen, analyze strengths and address specific challenges. Fueled by new insights, your organization can focus on how to better use present resources to begin a planned giving program or improve the overall effectiveness of current efforts. Endowment is an organization's long-term lifeblood.

How strong is your program?

focused

to address your challenges



Planned Giving Strategies | 100 Great Meadow Road | Suite 103 | Wethersfield, CT 06109 | 860 882.0074

On Demand Consulting Services

Cost-effectively target the planned giving expertise your organization needs.

■ Professional Action Plan:

After the initial review, we propose a plan of action which can make a big difference to the bottom line equal to many times the professional fee.

■ Strategy Sessions:

Behind the scenes assistance or second opinion for development professionals working with a donor's complex philanthropic plans.

■ Donor Meetings:

Individual donor meetings on behalf of your organization, on site or at our offices.

We believe in teamwork, supporting and encouraging the involvement of various professionals currently associated with your organization.

Board, Staff & Volunteer Training

Customized training sessions on a wide range of options and their benefits to increase internal support for your planned giving program:

Charitable Use of Life Insurance, Commercial Annuities and Retirement Accounts, Charitable Remainder Trusts, Charitable Lead Trusts, Charitable Gift Annuities, Donor Motivation.

One Session Donor Workshops

Your donor's philanthropic hearts can be opened with a combined approach using concern, care and honor with finances, recognition and reward. We educate and motivate with fact-filled, passionate, easily understood presentations.

■ Donor Motivation Workshop:

Cutting edge planned giving practices that show your donors how they can address their needs while leaving a legacy. Each workshop is customized to reveal the essence of your mission and inspire donors to take action!

■ True Wealth Blueprinting Workshop:

Help your donors uncover the 9 principles of true wealth—what money can't buy and death can't take away. A truly thought provoking, holistic approach to wealth planning, helping donors identify their hopes, dreams and life visions.

the proven solution

The Donor Motivation Program™

Strong, Solid Performance.

100% Guaranteed.

A 12 month customized working agreement administered in partnership with your organization.

Proven.

A complete system used by over 80 charities nationwide for the last 13 years, generating \$750 million in planned gifts.

Cost Effective.

The Donor Motivation Program™ costs a fraction of hiring an additional development professional and can also aid in the training of a junior development professional.

We feel so strongly about the Donor Motivation Program's™ success that we offer a 100% money back guarantee if your organization is not satisfied.

The Donor Motivation™ Program Includes:

■ Ongoing Live Personal Support:

Focused on one goal—

To bring your organization's story to life and start more donor conversations!

■ Four Donor Motivation Presentations:

Each enlightening, multimedia donor presentation is hosted by the non-profit organization and presented by Planned Giving Strategies.

■ A Comprehensive DMP Binder & CD:

Contains the entire turnkey program and the tools to make it happen—customized by Planned Giving Strategies for maximum impact with minimal effort from your staff.

■ Donor Meetings:

Donors meet with your development officer, a trusted advisor or Planned Giving Strategies to discuss what integrating a charitable gift into their retirement and estate planning could mean to their lifestyle, heirs, your organization and ultimately, their legacy.

All planned gifts begin with a conversation.
That's where we come in.
We start conversations that enhance relationships with ALL current and prospective donors.

We start conversations!

Planned Giving Strategies works in partnership with organizations that wish to begin or have already made a commitment to planned giving. We guide development efforts beyond short-term goals in a collaborative process built on trust and respect. Understanding the broader picture energizes non-profits to IMAGINE then create—A brightly endowed future.

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