

# You Need a Robust Gift Planning Program But Only Have So Many Hours in a Day

## Gift Planning Development has the expertise to provide you with the “essentials” to help you build a sustainable Planned Giving Program

Our Planned Giving Essentials Program, will provide you with professional, one-on-one guidance and support to create a successful and sustainable gift planning program. Our program starts with a one day on-site high-level assessment of your current fundraising program including interviews with leadership, the development team and if possible, a board member. Then over the course of six to eight months we'll have a series of conference (Skype) calls centered on creating the tools and material for your gift planning program.

We'll help get your Leadership and Board invested in the role of future gifts and their long-term importance to your mission. We will engage them in discussions, so they understand the:

- Critical importance of their participation in Essentials program
- Role of staff and volunteers
- Definition of donor-centered gift planning
- Why future gifts are important to an organization
- Measures of a successful donor-centered gift planning program

**Planned Giving Essentials will help you expand your fundraising potential with a proven process that enables you to see a measurable increase in your planned giving activities and revenue.**



gift planning  
development, llc

# What are the Essentials?

These are the Essentials that are the foundation to a successful and sustainable Planned Giving program:



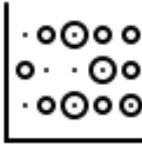
### Making the Case

Articulating why gift planning is important to your donors and your mission



### Infrastructure

Setting policies, procedures and guidelines in support of gift planning



### Prospects

Identifying, qualifying and approaching the best gift planning prospects



### Stewardship

Building life-long relationships with your gift planning donors and their families



### Communications & Marketing

Sharing how donor-centered, gift planning opportunities enhance your organization's impact



### Map to Success

Crafting and implementing a written plan for a sustainable program going forward, including a legacy campaign



### Training

Group training to give everyone the confidence to have a planned giving conversation with anyone

In addition to providing the Essentials philosophy and methodology, you will also receive support materials for future reference.

# How We Can Help You

We can help you expand your fundraising potential with proven processes that enable you to see a measurable increase in your planned giving activity and revenue.

We have experience working with all types and sizes of organizations. You need someone to help you create and execute a plan. We are committed to your success and we will coach you through every step of the way.

Our Planned Giving Essentials program is delivered to you with professional, one-on-one guidance and support to enable you to create a successful and sustainable gift planning program.

Using a carefully structured series of meetings, conference calls and sample materials, you will build the infrastructure required to identify gift planning prospects, cultivate relationships, close gifts and steward gift planning donors. The plan that you will develop during the program will provide you with clear action steps to follow along with action items to enhance and grow your gift planning.

