

**You need a Robust gift planning program.
You need a plan. You need to execute the plan.
We can help.**

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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 that includes interviews with leadership, your development team and if possible, a board member. Then over the course of six to eight months we'll hold a series of conference (Skype) calls centered on creating tools and materials specifically designed for your gift planning program.

We'll help get your leadership and board invested in the vital role that planned gifts play in the long term success of your organization. We'll engage them in discussions, so they understand:

- the critical importance of their participation in Essentials program
- the roles of staff and volunteers in your planned giving efforts
- the definition of donor-centered gift planning and why it works
- why planned gifts are so important to an organization
- measure of the effectiveness of your gift planning program

Planned Giving Essentials will help you expand your organization's fundraising potential with a proven process that will show you a measurable increase in your planned giving activities and revenue.



gift planning
development, llc

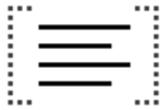
What are the Essentials?

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



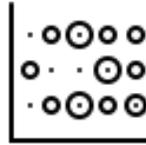
Making the Case

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



Infrastructure

Setting policies, procedures and guidelines to support 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 a solid infrastructure to identify gift planning prospects, cultivate relationships, close gifts and steward gift planning donors. The plan that you will develop through our program will provide you with clear action steps to follow, along with action items to enhance and grow your gift planning.

