

About Building Awareness for Planned Gifts

Do the members of your congregation know they can give more than a monthly pledge or a cash gift in the offering plate?

Planned giving allows people to give more than they ever thought they could. But they need to know what it is and how it works. That is, the churches need to educate their congregations about planned giving.



Effective planned giving marketing requires a solid strategy along with the following tactical steps:

1. Building awareness
2. Generating leads
3. Cultivating those leads
4. Closing gifts
5. Stewarding your relationships to increase the size of the gift and prevent getting ousted from inclusion

Although it's often overlooked, building awareness for planned gifts is very important. This is not blasting overly promotional messages in emails or spamming constituents with tax or financial planning strategies. This is the development of a thoughtful way to repetitively educate those among your supporters that simply don't realize they can easily leave your organization a bequest.

More than half of Americans don't even have a will (mostly because they simply avoid the subject). Who wants to think about their own demise anyway? No one! But tons of prospects would be glad to consider a planned gift if they only knew that such a gift was an option.

In many cases, awareness efforts can be very effective and quite inexpensive while reaping tremendous rewards. (See below for a list of inexpensive ways to raise awareness.) You should also consider the fact that many of your supporters can be found engaging with your organization on social media— “liking” and “sharing” your Facebook posts (for instance). Don’t forget that a growing number of seniors are online and using social media. Plus the cost to build awareness among seniors on social media is ridiculously low while the returns can be tremendously high (average gift in the U.S is between \$30,000 and \$60,000).

The least expensive ways to build awareness for your planned giving program.

The opportunities for building awareness for your planned giving program are all around you. Put these words everywhere you possibly can:

Please consider leaving {church name} in your will and estate plans.

- on emails;
- business cards;
- letterhead;
- mailers;
- reply forms;
- booklets;
- magazines;
- articles;
- photos;
- banners;
- invitations;
- research reports;
- website pages, etc.

The list goes on and on. Research shows that about 35% of Americans will consider a bequest as a gift. But they need to be made aware that your organization accepts them. Building awareness is one of the first steps for a successful planned giving marketing strategy. Don’t forget to use the free marketing channels you have available to you.

By Greg Warner
lmarketsmart.com