



# How to *Obtain* More Bequests

If you don't  
have a bequest  
program, it's  
time to start.



By G. Roger Schoenhals

Charitable bequests represent the bread-and-butter planned gift for virtually all nonprofit organizations. They can and should be promoted whether or not your organization has a full-blown planned-giving program in place.

Bequest promotion is easy, cost-effective, and wonderfully productive. In many cases, it's simply a matter of reminding your constituents to remember your organization when they create or update their wills. Here are 19 tips to help you get started in bequest promotion or develop your existing program:

## 1. Create a Will Information Kit.

Have this kit ready to send to anyone who expresses interest. It should include such items as: a

letter from the CEO; a brochure on wills and basic estate planning; a brochure on how to make a charitable gift through a will; sample bequest language with the correct legal name of your organization; and a response card. You could also include a fact sheet about your organization. Follow up with a phone call or letter a week after you send out the kit.

## 2. Engage the Full Board.

Every member of your board should make provisions for a future gift to your organization through their estate plan. In fact, it should be a prerequisite for board service! After all, asking others to make bequests rings hollow unless the governing body shows leadership in this area. Even if it's only a contingency bequest, the fact that

each member's will bears the organization's name will do more to inspire imitation by constituents than just about any other single thing. Gain your board chair's support in promoting wills to the board. The best way to earn the board's support is through your own example by including the organization in *your* will.

## 3. Develop Testimonial Cards.

A small, colorful card, suitable for slipping into a No. 10 envelope, can be a positive reminder that bequests count. The card should bear the photo of a person or couple who have included your organization in their will and the reasons they decided to do so. It should include the phone number and Web address of your organization's planned-giving officer or

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other contact person. It should also offer a complimentary Will Information Kit to anyone who's interested.

These cards can be used as "receipt stuffers" to accompany gift receipts. They can also be inserted in targeted mailings or more general direct-mail efforts.

#### 4. Print Reminders on Gift Receipts.

Every time someone makes a charitable gift to your organization, you send a gift receipt to acknowledge the gift. Why not print the following words at the bottom of the receipt: "Please remember ABCharity in your will"? It doesn't cost anything extra to do this, and it provides a gentle reminder to those who care enough about your organization to make a cash gift.

#### 5. Use Organizational Publications.

Your organization probably provides one or more newsletters

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to your constituents as a way to provide information and build support. A brief article, perhaps in a planned-giving "corner," could highlight individuals who have recently included your organization in their estate plans. You can also use this space to announce bequests that have "matured."

By using existing publications, you eliminate the time and monetary costs of developing separate materials. In fact, you might make a case for including "Please remember ABCharity in your will" at the bottom of just about every printed piece your organization uses, including stationery.

#### 6. Place "Ads" in Local Media.

Consider providing a boxed "ad" to local newspapers that might contain a finger with a string attached and the words "Remember to include ABCharity in your will." Or you could do a series of ads, each featuring a photo and the caption, "We included ABCharity in our will." The ads needn't be large to be effective. A more important feature is frequency. Throughout the year, you might also run 15-second spot ads on the radio with words something like this: "Leave a lasting legacy through your will. Include a bequest to ABCharity. For a free Will Information Kit, call (number)."

#### 7. Include a "Button" on Your Web Site.

Your organization likely has a Web site. The home page could include the words "Please remember ABCharity in your will" with a hyperlink to the planned-giving section, where further information is available. Or you could do something like, "For a free Will Information Kit, click here." Offer your free kit by mail, and also make it available as a pdf file for those who want to print it out. More and more older people are using the Internet, and your site should be ready with attractive and compelling information about planned gifts in general and bequests in particular.

#### 8. Generate News Releases.

Every bequest that matures is a newsworthy event. Someone in your office should be charged with the responsibility of generating and distributing a release to staff, board members, your primary organizational publication, and outside media outlets. Such news not only shows "insiders" the value of the planned-giving program, it also promotes bequests indirectly to everyone by demonstrating that people care enough about your organization to give you part of their treasured estates.

#### 9. Involve Your Staff.

Every member of your staff needs to be sensitized to the

### A Few Planned-Giving Terms

**Beneficiary:** One named in a will, trust, or other legal document to receive an interest in an estate.

**Bequest:** A direction in a will to pay over or distribute personal property. Also called a legacy.

**Estate:** Everything in which a deceased person owns an interest at the time of death.

**Irrevocable Trust:** A trust that can't be changed or dissolved.

**Legacy:** A disposition of personal property by a will.

**Life Estate:** A gift of property in which the donor retains the right to use the property for life.

**Life Income Trust:** A plan whereby gift assets are placed in trust for the lifetime benefit of an income beneficiary, with the remainder going to another beneficiary.

**Planned Giving:** Arrangement in which a donor sets aside money or property for a charity's future use.

**Remainder:** The amount remaining in a trust after income payments have ended. A remainder is vested when payable to a designated beneficiary.

**Revocable Trust:** A trust that can be changed or dissolved at any time by the grantor.

**Testamentary Trust:** A trust established through a will.

**Trust:** An arrangement whereby property is held by an individual or institution for the benefit of others.

**Will:** A legal instrument disposing of property at the time of someone's death.

importance of “thinking bequests.” Those who are soliciting donors for annual gifts can easily insert a comment such as, “The next time you update your will, I hope you will include a bequest for ABCharity in your estate plans.” Staff should have copies of your Will Information Kit to hand out. Also, be sure the staff has referral forms to let you know about any prospective planned-giving donors.

### **10. Sponsor Estate-Planning Seminars.**

These seminars can include a local estate-planning attorney talking about the basic ingredients of a sound estate plan, followed by your own presentation on planned giving. Sometimes it works best to target these seminars to special groups, such as widows and retired couples. Seminars should be held at easy-to-find locations and during times best suited for the particular audience. Smaller versions of these seminars could be held in the home of a board member or key donor.

### **11. Promote Bequests by Phone.**

Some organizations are finding success in calling people on their donor list. The call might go something like this: “Thank you for your ongoing support of ABCharity. I’m calling to let you know how much we appreciate your generosity and to ask whether you would

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consider naming ABCharity in your will. [pause] If this is something you may be interested in, we would like to send you a free Will Information Kit. It provides basic information for those who don’t have a will or who want to update their existing will. [pause] Would you like us to send you this complimentary packet of information?”



If your organization isn’t part of a Leave a Legacy® effort in your community, look into joining or starting one. Leave a Legacy® is a public awareness campaign conducted by the National Committee on Planned Giving (NCPG) to help the public learn about planned giving through a will or from an estate.

According to research, only about 8% of donors continue their support through a charitable bequest. NCPG decided that nonprofits could multiply their effectiveness in reaching planned gift prospects through a community-wide marketing effort. By offering the Leave a Legacy® concept as a collaboration of nonprofits in a community, NCPG offers a cost-effective marketing solution.

Leave a Legacy® is sweeping North America and raising the awareness of charitable gift planning as nothing before. It is bringing people of good will together and enriching the charitable fabric of our communities. For more information, see [www.leavealegacy.org](http://www.leavealegacy.org) or [www.ncp.org](http://www.ncp.org).

### **12. Make Responding Easy.**

When an article or conversation offers further information, the means to receive this material needs to be simple and clear. If you’re sending a direct-mail piece, include a response device and self-addressed, stamped envelope. Some organizations slip in a small pencil to make it even easier to respond to a checklist on a response card. Articles, display “ads,” and information on the Web should include a toll-free number. After inviting someone to learn more about planned giving, roll out the red carpet of immediate service.

### **13. Mail an Annual Appeal.**

At least once a year, send a bequest mailing to all members of your constituency, asking recipients whether they’ve named your organization in their will and, if so, in what way. You will find new names popping up from every mailing, providing you with new planned-giving prospects. The appeal should also ask whether any prospective donors would be

willing to consider including a bequest for your organization. These respondents deserve a follow-up visit soon and a concerted effort of sincere cultivation.

### **14. Target Special Mailings.**

In addition to an annual “sweep” mailing, you can focus in on special segments of your constituency for specific attention. For example, annual fund supporters who have young children might receive a letter urging them to consider estate planning for their children’s sake, including provisions for guardians and trusts. A bequest might be promoted in terms of a contingency provision, thereby providing maximum support for the children during their dependent years. Another target audience might be widows, who may appreciate the simplicity of a bequest program in making future estate gifts.

### **15. Time Your Mailing Efforts.**

Your planned-giving prospects may be more receptive to bequest

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promotion at certain times of the year. As people approach summer and consider extended travels, for instance, they may want to be sure that estate-planning decisions and documents have been taken care of in advance. Consequently, a target mailing to retired couples about wills might be good for late spring. Birthdays might also be a good time to address bequest possibilities.

Look at the calendar and plan your mailings accordingly. Keep alert for happenings that can sensitize people to estate-planning concerns. A national disaster or news about international unrest, for instance, may prompt people to be more receptive to will information.

### **16. Herald Your Recognition Society.**

If you don't have a recognition society for your planned-giving donors, you're missing one of the best vehicles for promoting planned gifts. Get such a society started soon, and select a name that fits your organization. Use

this society to draw together those who've made estate-planning provisions, including bequests. Periodically arrange for special programs, and include updates from your organization's president. Sponsor an annual dinner to induct new members into your society. Announce the happenings of this society throughout your constituency, and make it special to belong.

### **17. Involve Professional Advisers.**

Lawyers, CPAs, insurance professionals, and financial planners are in the business of talking to people about their estate plans. Get to know these advisers in your community, and make sure they're well acquainted with your organization. Provide them with a file folder, updated annually, with a few of your recent annual reports, sample bequest language, information about your recognition society, and a supply of your business cards. As these professionals come

**At least once a year, send a bequest mailing.**

to respect and trust you, they'll be more likely to make bequest suggestions to their clients that will benefit your organization.

### **18. Provide Suitable Recognition.**

Once a person has designated your organization for a bequest or other planned gift, provide a certificate of appreciation, life-long membership in your recognition society, and other special indicators of your appreciation. Sincere gratitude will help cement a revocable gift (like a bequest designation) and cause your donors to feel so good they'll want to tell their friends about their happy experience with your organization. You simply can't say thank you enough.

### **19. Repeat, Repeat, Repeat.**

The key to successful bequest promotion is repetition. Again and again, your constituents need to be reminded that leaving a bequest to your organization is possible and

important. Just sending out a few mailings each year and including a "remember us" note on a gift receipt isn't enough. Never tire of telling others to leave a bequest to your organization. Let it be your mission to lead the charge by promoting bequests vigorously, creatively, and with a positive spirit. ■

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### **Your Planned-Giving Survival Kit**

Use these *Nonprofit World* articles to develop your planned-giving program. These and many other planned-giving resources are available from the Society at [www.snpo.org/articles](http://www.snpo.org/articles).

**Planned Giving with Gift Annuities** (Vol. 14, No. 2)

**Why Planned Giving?** (Vol. 12, No. 2)

**Put the Government on a Tax Diet with a CRT** (Vol. 14, No. 6)

**How to Start a Planned Giving Program** (Vol. 9, No. 3)

**Insure Your Fundraising Future** (Vol. 13, No. 2)

**Untangling the Confusion of Planned Giving** (Vol. 17, No. 5)

**Don't Miss the Planned Giving Opportunity** (Vol. 13, No. 3)

**Attract Major Gifts with a CRT** (Vol. 18, No. 1)

**Use Your Fundraising Campaign to Increase Planned Giving** (Vol. 7, No. 1)

**Attorneys and Planned Giving** (Vol. 11, No. 1)

**Is Planned Giving Right for You?** (Vol. 22, No. 5)

**How to Market Planned Giving to Donors** (Vol. 22, No. 6)