

Is Your Legacy Society Dreary Or Dynamic?

A legacy society can be one of your best fundraising tools. Make it the best it can be.

By Claire Meyerhoff

Do you want more planned gifts – more bequests, outright gifts of stock, charitable trusts, IRA rollovers, gifts from life insurance and retirement plans?

Then raise the profile of your legacy society. If you don't have one, there's no better time to start one than right now.

A legacy society is, quite simply, a program that encourages your donors to leave planned gifts, usually focused on bequests they can easily make in their wills. Once donors commit to making such a future gift, you induct them into your legacy society.

While a legacy society is usually thought of as a stewardship vessel, you should also think of it in terms of marketing and promotion. A legacy society is one of the best ways you can market planned giving to your donors. But to do so, you have to raise its profile. Take your legacy society from a dreary mention at the back of your annual report to a dynamic, fun way to recognize donors. Put your legacy society out front.

The most important thing about marketing the concept of planned gifts to your donors is to show them that other people – people just like them – do this. Let them know that naming a charity in their will or creating another

“Don't use the waste-of-space headline “Donor Profile.””

type of charitable plan is something many “everyday philanthropists” do. It's a social norm.

Here are five ideas to jazz up your legacy society and get more attention for it – and they're all very budget-friendly.

1. Share Lovely Donor Stories.

Your planned-giving donors have a story to tell. They're making a gift of a lifetime – but *why*? The answer is bound to make a fascinating tale. With your legacy-society branding prominently featured, put their story on your website, on social media, in your newsletter, and in direct-mail pieces.

Here's a good example:

Henry loved hiking the trails near his home, and while recovering from heart surgery, he ventured back – a little bit each day. While hiking, he thought about what mattered most, then named the Trail Conservancy in his will.

The story appeared on the Trail Conservancy's website featuring a photo of Henry hiking and the title “These Trails Gave Me Life,” not the waste-of-space headline “Donor Profile.”

2. Promote Your Legacy Society at Events & Online Get-Togethers.

Many nonprofits are now giving people the option of attending their events online or in person. The pandemic has made online gatherings comfortable to almost everyone, and virtual meetings are also more convenient for many people. Whether your event is 100% in-person, a hybrid (some in person, some online), or totally virtual, you can use it as a chance to market your legacy society.

For your in-person auction, golf tournament, reunion, or other function, make a stand-up display with a great photo and caption along with your legacy-society's logo and URL. Use a donor-centered photo. For instance, in the case described earlier, you could use a photo of Henry hiking and add a caption giving Henry's story – like the one in the above example. Set up a table, hosted by a board member, and



offer a tasty treat – like fancy cake pops. Give out a simple info-piece like an “Advisor Guide” for prospective planned-giving donors to share with their attorney and accountant.

If you’re holding a virtual or hybrid event, you can offer the same stories, info-pieces, captivating photos, and opportunities to join your legacy society, even to those who aren’t physically present. Make sure to energize both in-person and virtual attendees. Videos are an excellent way to tell your story, raise enthusiasm, and make people feel connected whether they’re in the same room or at home on their couches.

3. Give Your Legacy Society a Cool Name.

If it’s already called “Legacy Society,” that’s fine. But if you don’t have much invested (letterhead, recognition wall, engraved gifts), consider a new name with personality.

For example, one nonprofit – Pearl S. Buck International – changed its dormant “Visionary Society” into “The Camellia Circle,” named for Pearl S. Buck’s favorite flower. A more personalized name jump-started the revitalization of the organization’s legacy society.

Think about this: Task a few board members with coming up with a new name. It’s a great way to start the planned-giving conversation.

4. Give Out Legacy Pins.

At a volunteer recognition luncheon, the Pearl S. Buck development director presented the newly designed Camellia Circle pin to a volunteer (who was also a planned-giving donor) in front of a roomful of prospective donors. Nice.

A pin is great for marketing content. If you work for a dog rescue charity, snap a photo of a dog “presenting” a legacy pin to a planned-giving donor for Facebook and your newsletter.


Don’t have a pin? Ask a local artist to design one. Then promote the story of the newly designed pin on social media, in your newsletter, and through other communication platforms.

5. Create a Pocket Pal.

Design a simple invitation to join your legacy society. Make it small enough for people to carry in their pockets to give out to anyone who might be interested. In addition to inviting people to join the legacy society, include ideas for ways to give. Also include information a professional advisor needs

to help carry out a planned gift (such as sample bequest language).

Those pocket pals are especially useful if you (or a board or staff member) have a meeting with a donor or happen to meet one by chance. You can say, “Have you considered putting us in your will and joining our legacy society? Here’s an invitation with a number for you to call if you have questions.”

Planned-giving marketing is easier than you think. No matter where you are in the planned-giving game, you can do a few things today that will help bring in awesome gifts tomorrow. And a dynamic legacy society is the best place to start. 

Claire Meyerhoff is a nationally recognized nonprofit communications consultant who specializes in helping philanthropy professionals with marketing and stewardship projects. She started The Planned Giving Agency, LLC (pgagency.com) after years of success working with well known planned-giving marketing firms. As a former broadcast journalist, Claire brings a unique and fresh perspective to the charitable sector. Based in Washington, D.C. and Raleigh, N.C., Claire presents at conferences and local gift-planning groups.

Secure Your Financial Future with Planned Gifts

Donors who leave legacy gifts in their wills are your most loving, caring, passionate supporters. Having a visible, vibrant legacy society will boost your share of planned gifts.

We’re currently experiencing the largest wealth transfer ever known – estimated at \$46 billion. Don’t miss out on the huge potential of planned giving as a marketing strategy.

Find more planned-giving guidance at NonprofitWorld.org:

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

How to Obtain More Bequests (Vol. 23, No. 2)

Planned-Giving Tips for Every Organization (Vol. 23, No. 6)

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

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

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

Revolutionary Fundraising Opportunity: Life Settlements (Vol. 23, No. 1)

Tax Reporting for Gifts of Annuities (Vol. 23, No. 6)

The Best Way to Tell Your Organization’s Story? Capture It on Video (Vol. 35, No. 4)

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

“Let people know that leaving legacy gifts is a social norm.”