The Five Ws of Planned Giving

Presented by:
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The Five Ws of Planned Giving

- WHO
- WHY
- WHAT
- WHERE
- WHEN
The Five Ws of Planned Giving

Who is involved in a Planned Giving program?

What is Planned Giving?

When should you start a Planned Giving program?

Where do Planned Giving gifts come from?

Why should your organization have a Planned Giving Program?
Who is involved in a Planned Giving program?

Nonprofit:

• Leaders
• Directors
• Staff
• Donors
• Members
• Volunteers & Supporters
A gift given to a 501(c)(3) nonprofit by an individual:

- Wills - Bequests
- Life Insurance
- Retirement Accounts
- Stocks / Annuities
- Real Estate
When should you start a Planned Giving program?

• Now
• Today
• Soon
• Immediately
• Yesterday
Where do Planned Giving gifts come from?

- Regular donors
- Believers in your mission & work
- Supporters who would like to give a larger gift in the future.
Why should your organization have a Planned Giving Program?

• Fund an endowment
• Additional fundraiser
• Sustain projects and programs
• Build a foundation for generations to come.
Bonus: *How* to start a Planned Giving Program

- Get information from a professional to set up a planned giving program.

- Inform your board of directors, trustees, staff and other leaders about planned giving.

- Have professionals conduct seminars about estate planning and invite your donors, members and supporters.

- Market your program to donors, supporters, members and friends.
The Law Office of Aquanetta J. Betts, LLC

congratulates

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for attending The Five Ws of Planned Giving

Presentation on

This ___________ day of __________________________, 20 _______.

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