



# Earn Their Hearts and Their Support

A Donor-Centric Approach to Legacy Marketing



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CONTENT DIRECTOR



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CLIENT STRATEGIST



Added flair and real-world anecdotes provided throughout by President, Nathan Stelter.

**1**  
Who gives legacy gifts?

**2**  
Where are they in their giving journey?

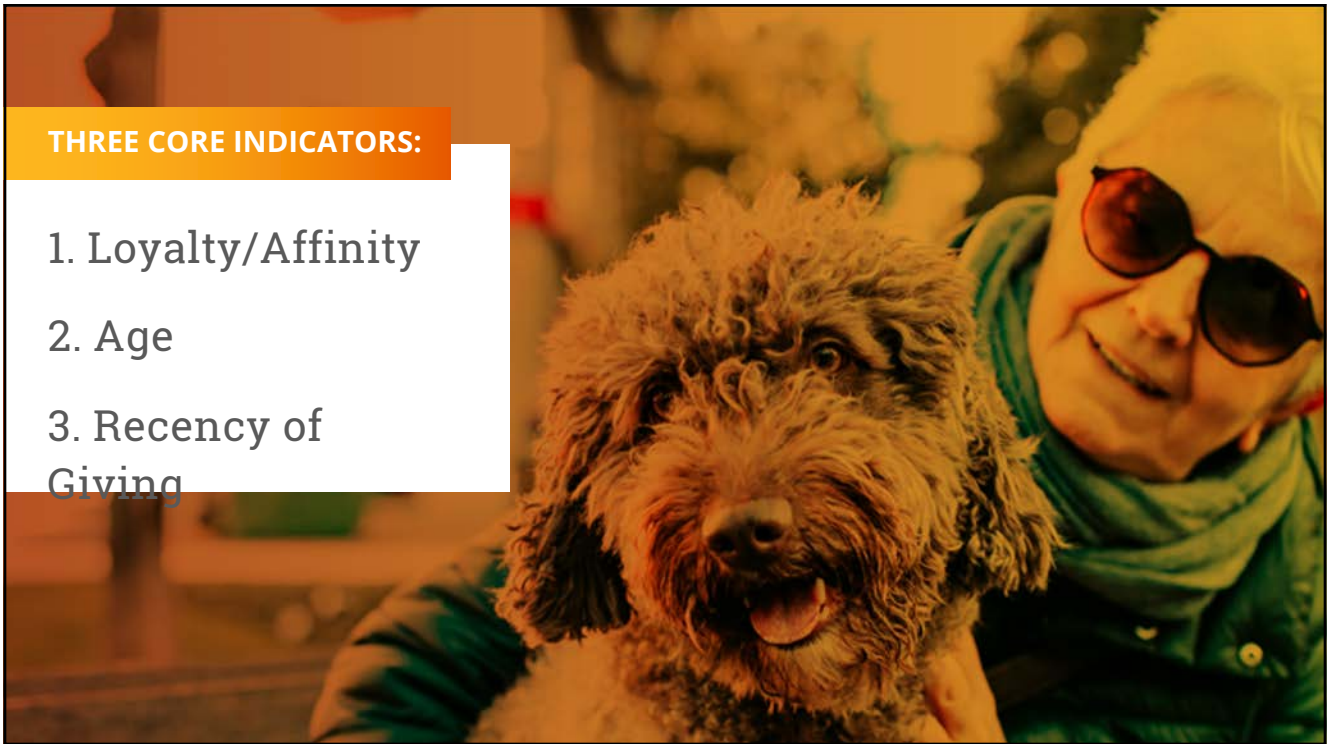
**3**  
How do we market to them?

**S** + 3 To-Dos for You

### The Golden Rule of Marketing

Category	Percentage
List	40%
Offer	40%
Creative	20%

**List**      **Offer**      **Creative**



**THREE CORE INDICATORS:**

- 1. Loyalty/Affinity
- 2. Age
- 3. Recency of Giving

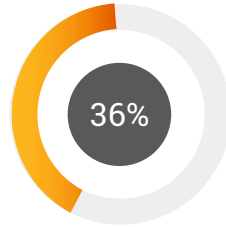


Older

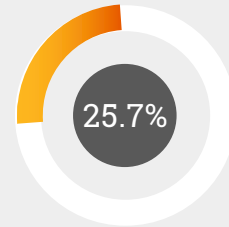
Wealthier

Childless

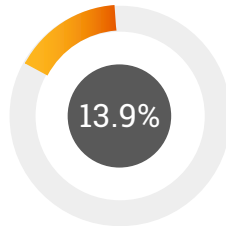
Hey, you  
might be  
missing  
someone.



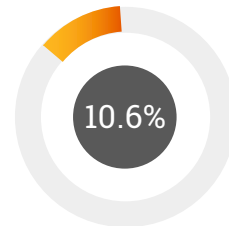
Alumni of the Organization



Served as Volunteers



Served as Board Members



Staff of the Organization

More than 80% of  
planned gifts come in the  
form of gifts in wills.



1  
Who gives legacy gifts?


2  
Where are they in their giving journey?

3  
How do we market to them?

+ 3 To-Dos for You

## Legacy Giving Donor Journey

- SUPPORTING
- DISCOVERING
- CONSIDERING
- DECIDING
- ACTING




PHASE 1 OF 5  
**Supporting**

**Waypoints**

- Supports mission
- Receives thank-you messages and evidence of impact
- Deepens engagement

**Watch for**

- Increasing giving frequency or amount
- Engaging through advocacy or volunteer roles



PHASE 2 OF 5  
**Discovering**

**Waypoints**

- Feels connected and appreciated
- Introduced to idea of planned giving

**Watch for**

- High engagement with nonprofit
- Reading introductory legacy giving articles







PHASE 3 OF 5  
**Considering**

**Waypoints**

- Reflects on finances and plans
- Considers values and legacy
- Weighs priorities

**Watch for**

- Opportunities to strengthen identity formation
- Interest in nonprofit's vision and impact






PHASE 4 OF 5  
**Deciding**


**Waypoints**

- Integrates nonprofit with identity
- Researches options
- Decides to make a legacy gift

**Watch for**

- Increased web traffic
- Gift vehicle research
- Contacting gift officer





PHASE 5 OF 5  
**Acting**

**Waypoints**

- Assembles estate planning team
- Arranges gift
- Notifies nonprofit

**Watch for**

- Requesting bequest language
- Completing gift notification form



**Navigating with Nate**

LET'S TALK STEWARDSHIP





## Where do we develop mindsets?

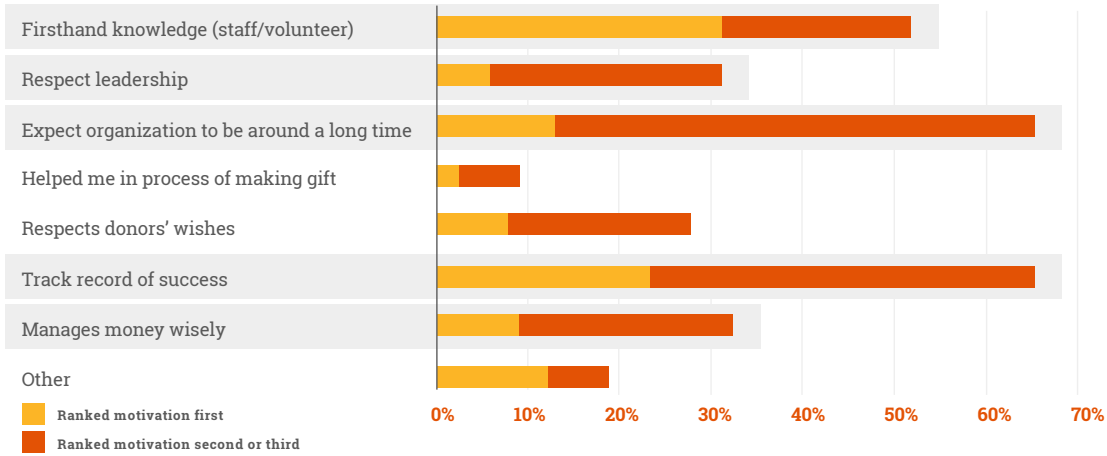
- SUPPORTING
- DISCOVERING
- CONSIDERING
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## This organization is trustworthy.

- BELIEF THAT AN ORGANIZATION CAN BE TRUSTED
- BELIEF IN AN ORGANIZATION'S LONGEVITY
- BELIEF THAT AN ORGANIZATION IS FINANCIALLY SOUND

## Top factors (besides mission) in choosing organization for largest gift



Leaving a Legacy, Giving USA, 2020

### Join Us as We Celebrate 50 Years of Caring for Children

For 50 years Miller Children's & Women's has been providing quality, child-centric services to kids who need it most.

We hope you'll join us and be a part of the celebration by accepting the 50@50 Challenge. All you need to do is include a gift to Memorial Medical Center Foundation in your estate plan and let us know. Not only will your gift allow you to play an important role in our future, you'll also become the newest member of the Seaside Legacy Circle.



The issue of hunger in America is complex, enduring and widespread. About 37 million people struggle with hunger in the U.S., making the need for Feeding America's research, advocacy and nationwide network of 200 food banks and 60,000 food pantries and meal programs more urgent than ever. Yet Feeding America isn't funded by commercial means. Instead, we rely on donors like you to fuel the fight against hunger long term.

#### YOUR BENEFITS

A gift to Feeding America in your will or financial plan:

- enables you to make a greater impact than you may have thought possible
- may provide you with financial and/or tax benefits
- is often realized after your lifetime, so your current budget isn't affected

#### WHY FEEDING AMERICA



**1 in 7**  
Americans receive help each year



**4.6 billion**  
Meals are provided each year



**99%**  
Of donations raised go directly to programs for people in need



**4-star rating**  
Charity Navigator's highest overall rating

To learn how you can support a hunger-free America, contact Jessica Noe at (800) 771-2303, Ext. 5593.



# I am connected to this work.

**BELIEF THAT ONE'S GIFTS MATTER**  
**BELIEF THAT AN ORGANIZATION IS PART OF ONE'S LIFE STORY**



*From its beginning*, the Forever True, For Iowa State campaign set out to help more students access their dream of an Iowa State education. **Nearly 7,000 students received donor-funded scholarships last year alone.**

In addition, many students who faced financial hardships due to the COVID-19 pandemic received support from donors like Mike and Mary Ann Kazemko through the Cyclone Strong Fund or completion grants that helped them stay at Iowa State.

The momentum of the Forever True campaign remains strong as we approach its final months. Most importantly, donors are already making a difference.



**“**This scholarship has given me so much. It’s given me freedom of time, which I didn’t realize I would cherish as much as I do now. I’m no longer working so much to avoid eviction notices, and I can enjoy life.

Iowa State senior



**“**This scholarship allowed me to focus on my studies without worrying about how I would pay for my books and tuition. It helped me avoid taking out loans.

Iowa State



**“**This scholarship relieved my stress about how I was going to pay for my books and tuition, and even covered some of my housing. I struggle financially every year as to how I will cover these expenses in order to keep attending college. The Heiden Fund mitigated these worries, and I could not be more grateful for the support.

—JOEZEL NORIEGA,  
Iowa State junior and Heiden Fund for Women in Business Scholarship recipient



**“**The lack of two incomes [in my household] put a strain on my dreams and college goals, but I was able to persevere and work my way through college along with the help of scholarships that the Hrabas graciously provide. The support has meant the world to me and has helped me be able to keep working toward my college and career goals.

—BRYCE FRIEDERICH,  
Iowa State senior studying hospitality management and a Hrabas Scholarship recipient



**“**This scholarship relieved my stress about how I was going to pay for my books and tuition, and even covered some of my housing. I struggle financially every year as to how I will cover these expenses in order to keep attending college. The Heiden Fund mitigated these worries, and I could not be more grateful for the support.

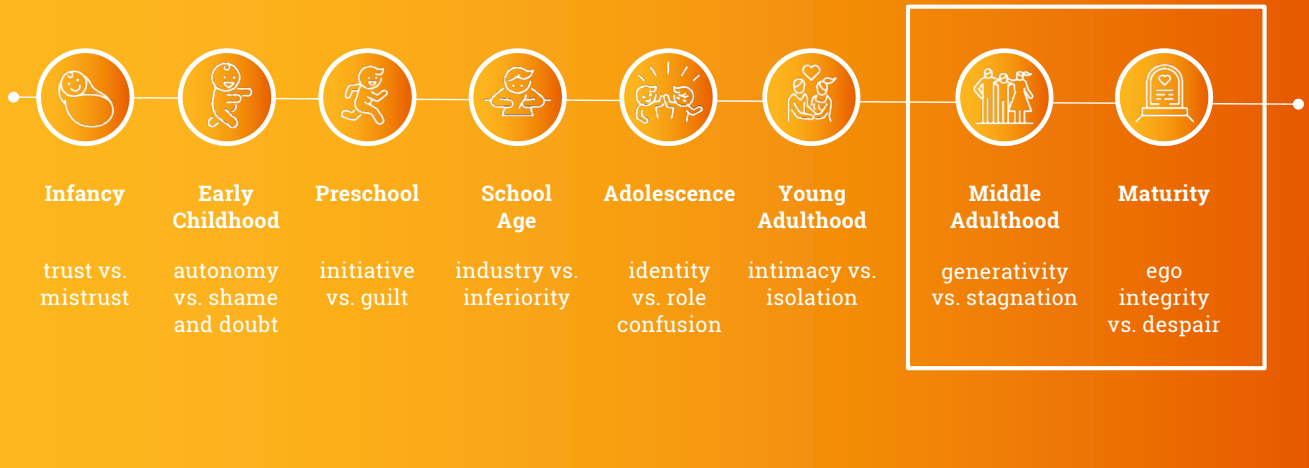
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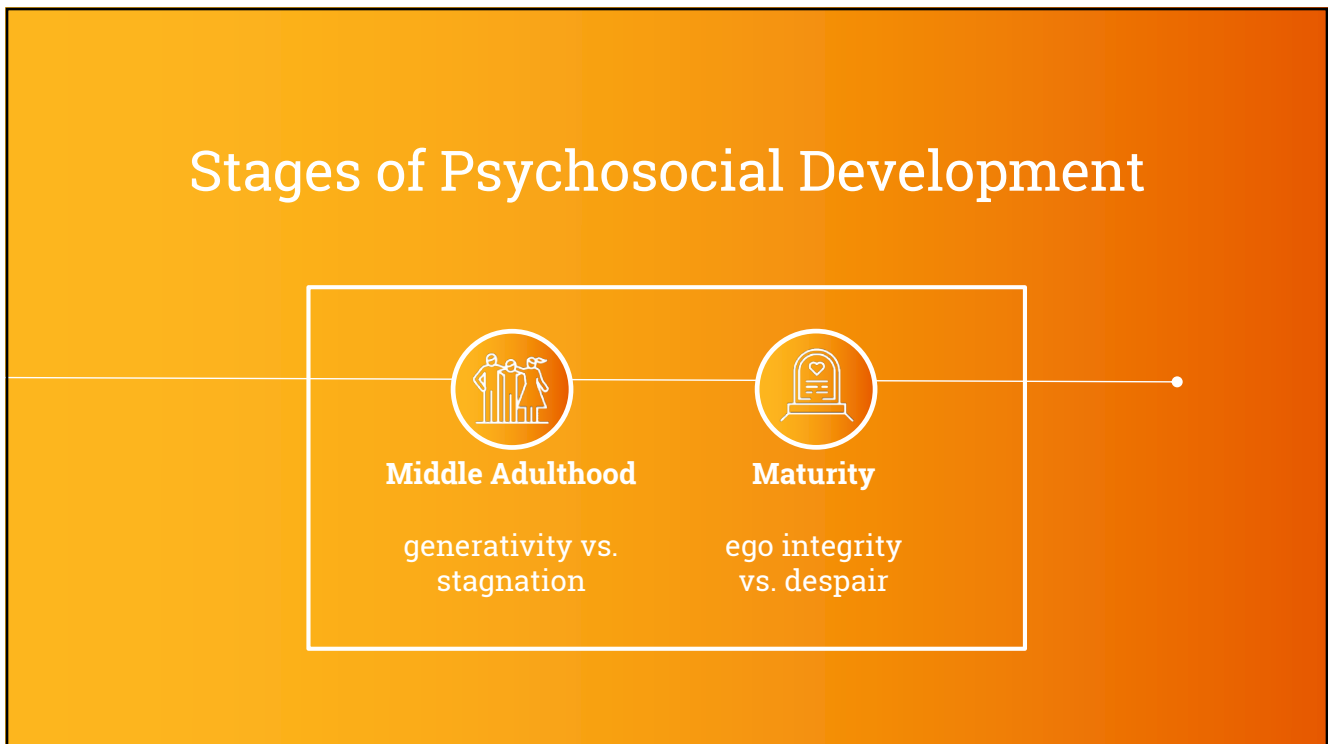
## An estate gift is a smart choice.

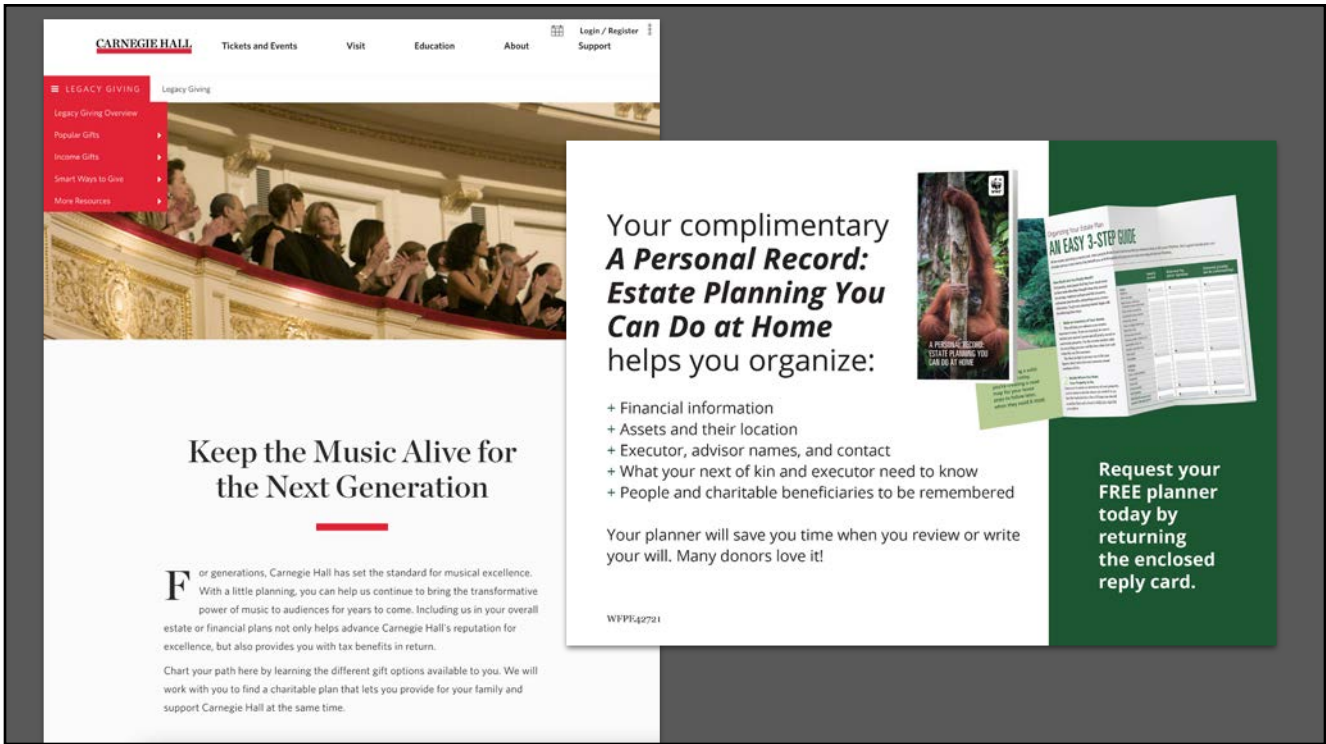
BELIEF THAT ONE WANTS TO BE REMEMBERED  
BELIEF THAT A DONOR DOES NOT NEED TO LEAVE ESTATE TO HEIRS  
BELIEF THAT ESTATE PLANNING IS VALUABLE

## Stages of Psychosocial Development



## Stages of Psychosocial Development





**CARNEGIE HALL** Tickets and Events Visit Education About Login / Register Support

LEGACY GIVING Legacy Giving

- Legacy Giving Overview
- Popular Gifts
- Income Gifts
- Smart Ways to Give
- More Resources

## Keep the Music Alive for the Next Generation

For generations, Carnegie Hall has set the standard for musical excellence. With a little planning, you can help us continue to bring the transformative power of music to audiences for years to come. Including us in your overall estate or financial plans not only helps advance Carnegie Hall's reputation for excellence, but also provides you with tax benefits in return.

Chart your path here by learning the different gift options available to you. We will work with you to find a charitable plan that lets you provide for your family and support Carnegie Hall at the same time.

### Your complimentary *A Personal Record: Estate Planning You Can Do at Home* helps you organize:

- + Financial information
- + Assets and their location
- + Executor, advisor names, and contact
- + What your next of kin and executor need to know
- + People and charitable beneficiaries to be remembered

Your planner will save you time when you review or write your will. Many donors love it!

Request your **FREE** planner today by returning the enclosed reply card.

WPPE42721



# Navigating with Nate

HANDLING THE GIFT CONVERSATION



# I need to share my intentions.

**BELIEF THAT SHARING INTENTIONS WILL HELP WISHES BE FULFILLED**  
**BELIEF THAT SHARING INTENTIONS IS GOOD FOR THE NONPROFIT**

## Reasons donors choose not to disclose planned gifts

**Q: Why did you choose not to tell them?**

Did not want special attention/recognition	<b>48.3%</b>
Want to retain control over amount of gift	<b>37.9%</b>
Did not want to be asked for other gifts	<b>34.5%</b>
Felt that it was too personal to discuss	<b>29.3%</b>
Have not been asked by the nonprofit	<b>12.1%</b>
Concerned that the nonprofit would not respect my privacy	<b>10.3%</b>

<p><b>1</b></p> <p>Who gives legacy gifts?</p> 	<p><b>2</b></p> <p>Where are they in their giving journey?</p> 	<p><b>3</b></p> <p>How do we market to them?</p> 
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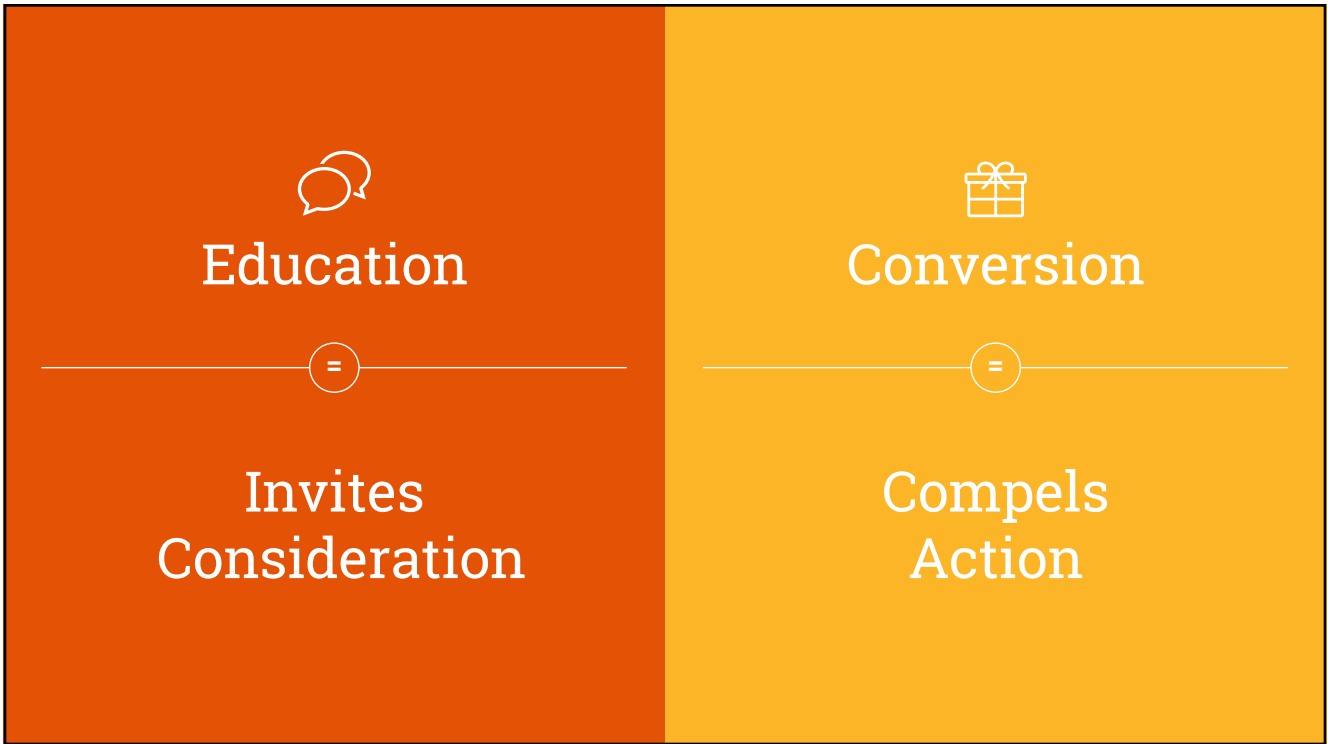
 + 3 To-Dos for You

  
**POLL TIME**

**Do you do conversion or educational marketing?**

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**Leave your world  
brighter, happier,  
healthier, greener,  
kinder, more vibrant,  
more creative,  
more compassionate,  
more innovative,  
more [insert your dream here].**

With a single pen stroke, you can leave your mark on the community more significantly and powerfully than you ever imagined. Making a charitable gift through your will or trust is a simple, tax-friendly way to support the causes, charities or community you love. And it can keep giving back in your name forever.

Now THAT'S legacy.

**Leave your mark.**

AKRON  
COMMUNITY  
FOUNDATION

**EDUCATION**

**CELEBRATING 125 YEARS**

## They May Never Know You

But they will always celebrate the friendships, opportunities, and Sisterhood made possible by people like Katherine and you.

"What I found in Chi Omega was a forever family. I want to make sure that after I am gone, I have left something for our Sisterhood to continue. It is that important. It is that powerful. It must be continued."

—Katherine Carter Pope, Upsilon/Union, Advisor, Delta Kappa/UNC-Charlotte  
Pictured below with Delta Kappa colleagues at Executive Headquarters

CHI OMEGA EXECUTIVE HEADQUARTERS

Strengthen the next generation of Chi Omega Sisters with a gift in your estate plan. Include Chi Omega in your will to make a statement for your forever family. Contact Sally Stephens Kimball at 901.748.8600 or [sally.kimball@chiomega.com](mailto:sally.kimball@chiomega.com) for no-obligation help.

**CONVERSION**

## Why You Need Both

**1/3**

**2/3**

**Hand raisers      Secret keepers**

**JUST LIKE YOUR  
MORNING SMOOTHIE,  
YOUR MARKETING  
IS BEST SERVED BLENDED.**



## Navigating with Nate

INTEGRATING YOUR MARKETING



# 3 To-Dos for You

AFTER YOU HIT "LEAVE" ON THIS ZOOM MEETING

1.



2.



3.



## Q&A TIME



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## Additional Questions

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[WWW.STELTER.COM](http://WWW.STELTER.COM)

## Webinar Resources

- Recording
- Presentation handouts



[WWW.STELTER.COM/WEBINARS](http://WWW.STELTER.COM/WEBINARS)

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to Legacy Marketing



*Thank you*