



Surviving and Thriving the "Silver Tsunami"

EXPANDING THE PIPELINE

**The Stelter Company Webinar Series
February 28, 2024**



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Learning Objectives

1. **Understand** the massive fundraising opportunity in legacy giving with the wave of Boomers and the changing mindset given the global pandemic.
2. **Identify** the five stages of the legacy donor journey and how this differs from traditional giving.
3. **Learn** key marketing approaches and techniques that effectively move donors along in their legacy giving journey using World Wildlife Fund as an example where we're seeing triple the results in their legacy giving marketing over the last three years!

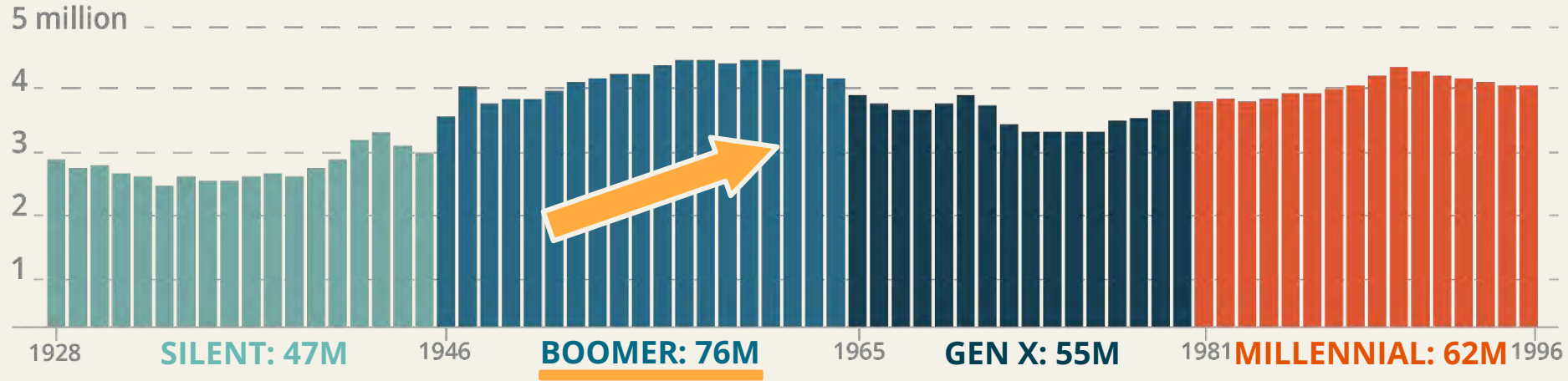




The Big Wave

HERE COME THE BOOMERS

Births by Year by Generation



Source: U.S. Department of Health and Human Services National Center for Health Statistics

PEW RESEARCH CENTER

The Silver Tsunami

10,000 Boomers

turn age 65

EVERY DAY

until 2030!

2020 U.S. Census





Boomers

- Increased life expectancy
- High levels of education
- Favorable real estate conditions
- Lower child birth rates
- Expansive work experience
- Dual incomes

**Greater economic security
than past generations!**



The Great Wealth Transfer

The Baby Boomer generation is
expected to leave

\$68 Trillion

to their Gen-X & Millennial children.

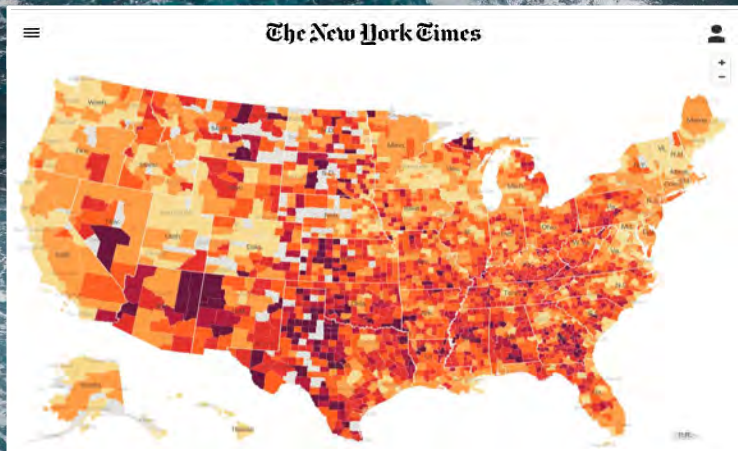
The Center on Wealth and
Philanthropy estimates that

\$6.3 Trillion

will be transferred to nonprofits
through charitable bequests
between 2007 and 2061.

A Tidal Shift

THE PANDEMIC



Washington, DC
8:01 AM ET

CORONAVIRUS PANDEMIC

IN THE UNITED STATES

TOTAL CASES
15,173,851

DEATHS
286,338

SOURCE: JAVES HOPKINS UNIVERSITY

SUNDAY ON CNN
CNN HEROES

HOSTED BY
ANDERSON COOPER
& KELLY RIPA

CORONAVIRUS PANDEMIC

FDA COULD AUTHORIZE PFIZER CORONAVIRUS VACCINE IN U.S. WITHIN DAYS

Alex Azar | Health and Human Services Secretary

LIVE

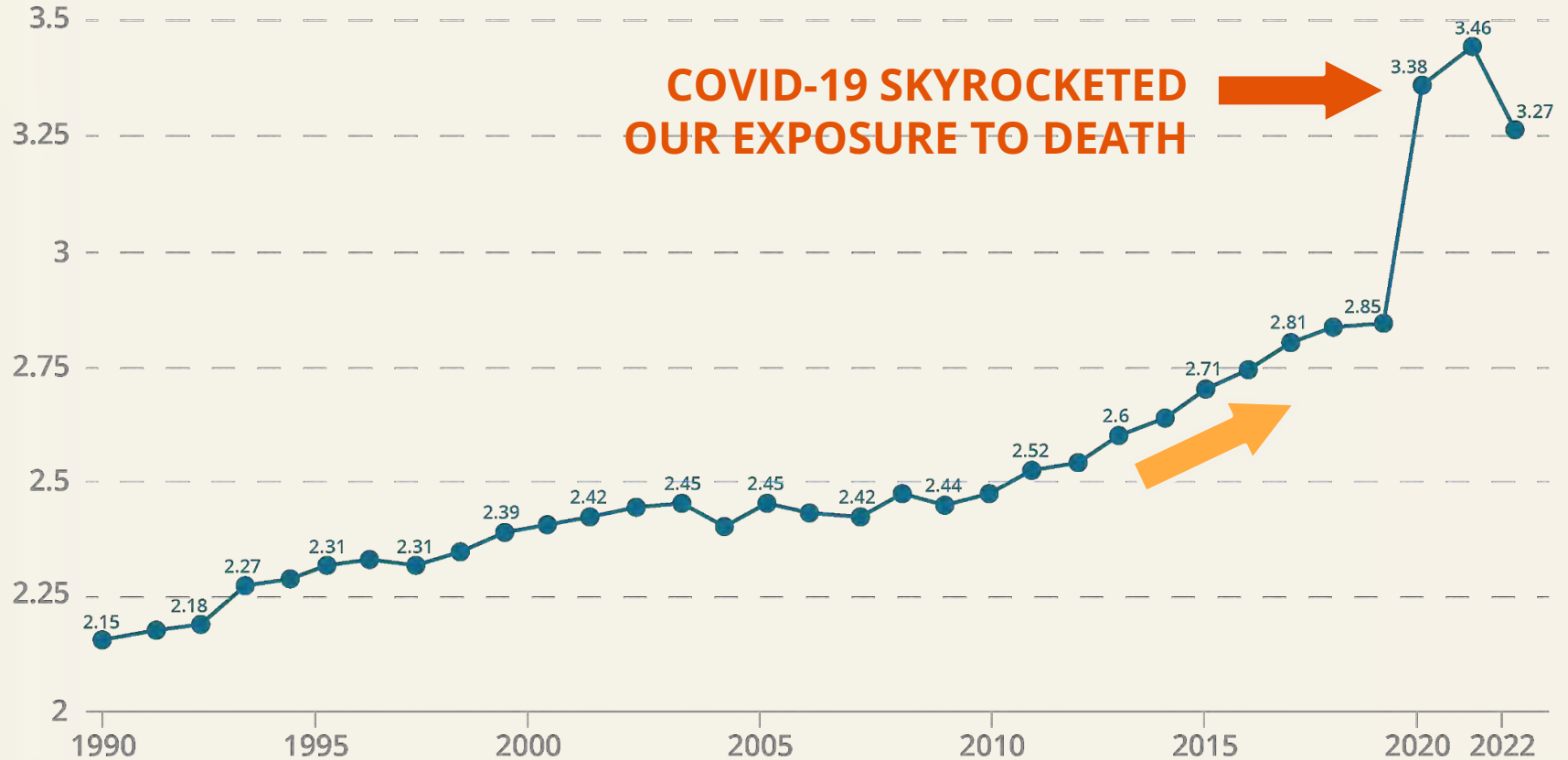
CNN

5:01 AM PT

MONDAY CHICAGO 49° DETROIT 46° HOUSTON 77°

NEW DAY

U.S. Deaths in Millions





Audience Poll...

What position did COVID-19 rank among the leading causes of U.S. deaths in 2020 to 2021?

- A. #1
- B. #3
- C. #5
- D. #10

ANSWER B: In 2021, COVID-19 ranked #3 with over 416k US deaths, behind #1 Heart Disease and #2 Cancer. (CDC Mortality)
In 2022, COVID-19 did move to #4 behind unintentional injury.

Enter your guess in the Zoom Poll pop-up window.



Legacy Giving on the Rise

According to an early-pandemic study by Marts and Lundy:

- More than half of the 328 organizations surveyed saw legacy donors increase their giving during the pandemic.
- Gift planning revenues and closure rates also increased or remained stable.

What's in the Big Wave?

THE LEGACY DONOR JOURNEY



The Groundswell

Regular Giving

1. Supporting

- Supports nonprofit's mission
- Nonprofit demonstrates competence
- "This work is important to me."

2. Discovering

- Feels connected
- Introduced to idea of legacy giving
- "My gift can make a difference."

The Face

Loyal Giving

3. Considering

- Reflects on finances and long-term plans
- Considers their values and legacy
- Weighs nonprofit against others and other obligations
- “People like me do things like this.”





Legacy Giving

The Crest

4. Deciding

- Integrates identity with nonprofit
- Researches legacy giving options
- Decides to make a legacy gift
- “This gift is a way I can live on.”

5. Acting

- Arranges legacy gift
- Notifies nonprofit*
- “I want to make sure my wishes will be fulfilled.”

The Invisible Internal Waves

The majority will not share because:

- 70% say "It's a private matter"
- 22% say "No one asked me"

NOTE: Marketing can ask the 22% who say they've never been asked and still reach the 70% who say its a private matter with caring messaging keeping you top of mind.

***Only 40% of planned givers inform charities of their legacy gift.**



Audience Poll...



What percentage of realized legacy gifts does World Wildlife Fund know about?

A. 17%

B. 28%

C. 36%

D. 47%

ANSWER A: WWF is aware of only 17% of their realized legacy gifts. This varies for every nonprofit organization.

Enter your guess in the Zoom Poll pop-up window.



Wax Your Surfboard

A CASE FOR MARKETING



Marketing Benefits

- Reaches hundreds of thousands vs. limited 100-200 portfolio of gift officer
- Helps gift officers by moving donor's along the planned giving journey
- Provides funnel for gift officer focus

Using key marketing tactics, Stelter and WWF have tripled both hand raisers and new planned gift intentions.

WWF views marketing as a member of their Gift Planning team!



Audience Poll...



How many Gift Planning officers do you think WWF has?

- A. 3
- B. 7
- C. 14
- D. 18

ANSWER A: While there are 10 people on the WWF Gift Planning team, there are only **THREE** donor-facing gift officers!

Enter your guess in the Zoom Poll pop-up window.

Multi-Tiered Marketing



Identify Prospects

Educate

Convert

Steward



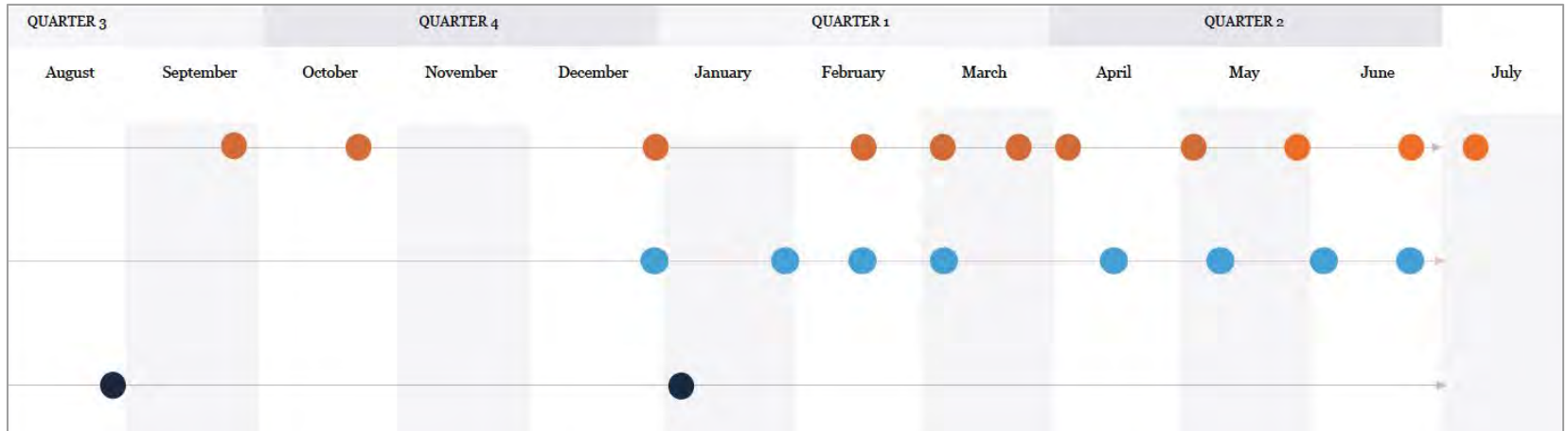


How to "Hang Ten"

MARKETING BEST PRACTICES

The Yearly Plan - Be Consistent!

WWF 2023-2024 Marketing Calendar

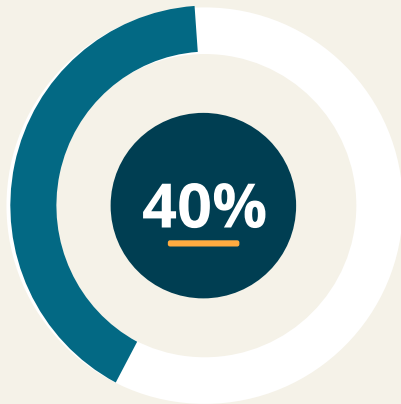


● Primary Campaigns

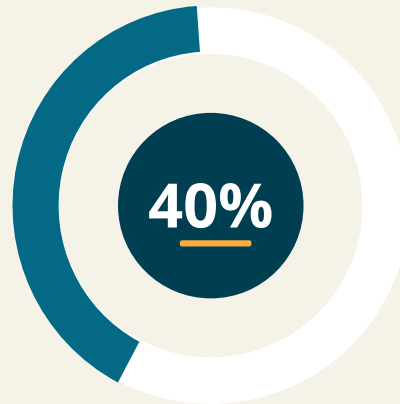
● Drip Campaigns

● Survey

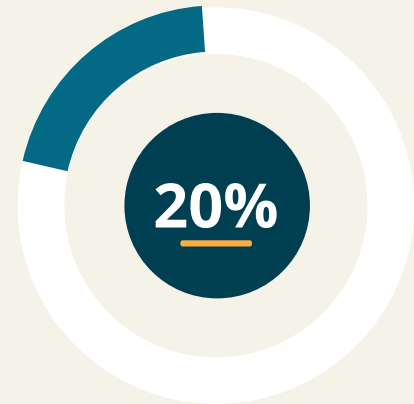
The Golden Rule of Marketing



AUDIENCE LIST



OFFER



CREATIVE

Audience Wins!

Often overlooked due to complexity and “the abyss” of databases.

We work together with WWF’s internal team to custom model:

- PG Intender
- PG Bequest Likelihood
- CGA Likelihood





Watch Out for Great Whites!

- Too much “Do Not Solicit” in your database can take a bite out of your PG results.
- Planned giving marketing provides helpful tools and information, rather than soliciting for a gift.

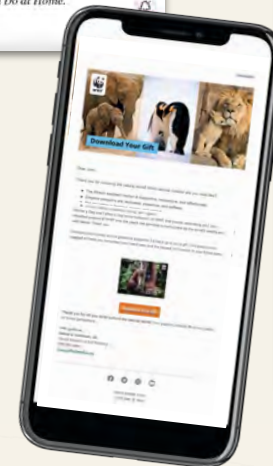
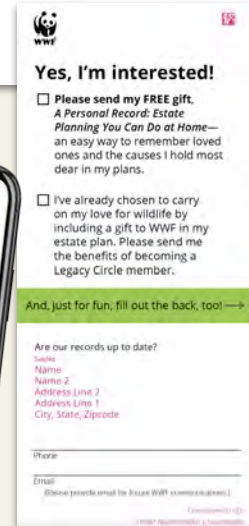
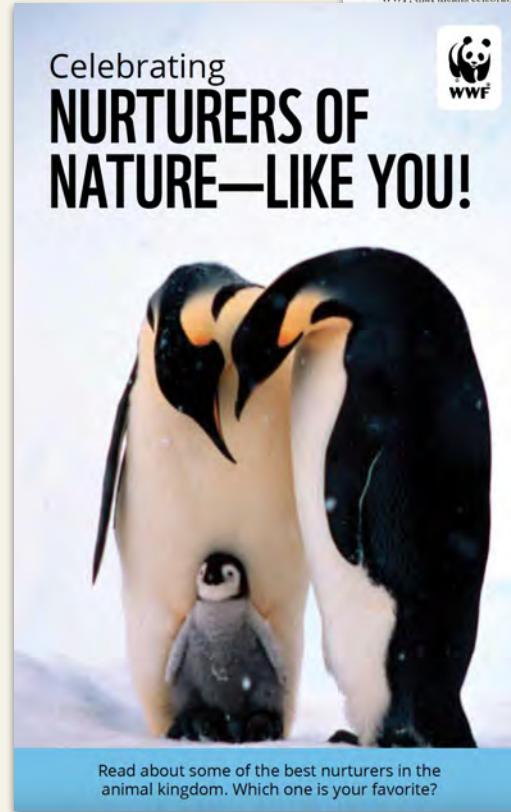
The Big Surf Competition

WWF EXAMPLES IN ACTION




Targeted Wills

- Seasonal delivery around Mother's and Father's Day
- Celebrates them as "Nurturers of Nature" with greeting card
- Includes fun engagement!
- Shares how they can carry on their love for nature through a gift in their will





Targeted CGA

- Special gift that can “boost your income”
- Present custom gift examples based on the recipient’s age and past giving



World Wildlife Fund
1250 24th Street, NW
Washington, D.C. 20037

New and improved rates are here!

World Wildlife Fund
1250 24th Street, NW | Washington, DC 20037 | 888 933 5455
worldwildlife.org

September 29, 2022

Dear **Salutation**,

Thank you for being a constant hero for our planet. Your dedication to protecting life on Earth is making a difference in creating a healthy future for people and nature.

Did you know there is an easy gift that can extend your impact and benefit you in return? It's called a charitable gift annuity (CGA). This unique arrangement lets you make a significant gift while enjoying lifetime income and a potential charitable tax deduction.

Now is a great time to consider this gift, thanks to new and improved annuity rates:

Here's how it works: You transfer assets to WWF, and in return, you receive fixed, regular payments for life. The remainder of your gift will support worldwide conservation efforts.

During times of uncertainty, a CGA with WWF can be a valuable opportunity to boost your retirement income while creating a meaningful legacy. Return the enclosed reply card to find out more.

Depending on how you set up the gift, there are several benefits you may receive:

1. A charitable tax deduction in the year you make the gift.

Continued on back →

Best rates since 2018!

EXAMPLE*

Age at time of gift: **Age at Gift**

Rate: **Rate**

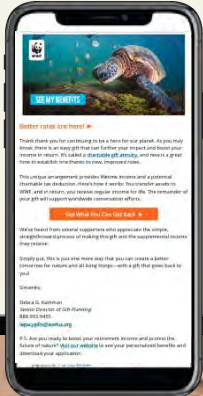
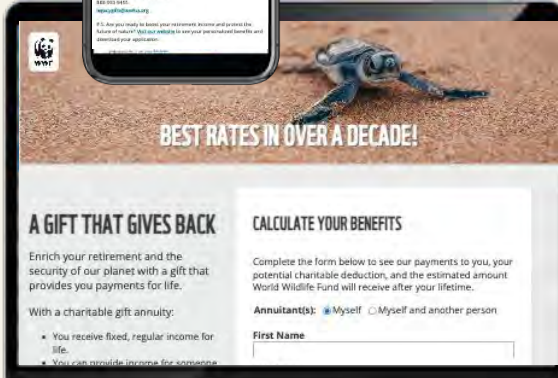
Assets used: **VDI in cash**

Charitable deduction: **Charitable Deduction**

Annual income received: **Payment**

*Based on a VDI cash gift and a 3.8% charitable midterm federal rate. Deductions and calculations will vary depending on your personal circumstances.

Get | Sign Up

BEST RATES IN OVER A DECADE!

A GIFT THAT GIVES BACK

Enrich your retirement and the security of our planet with a gift that provides you payments for life.

With a charitable gift annuity:


- You receive fixed, regular income for life.
- You can provide income for someone else.

CALCULATE YOUR BENEFITS

Complete the form below to see our payments to you, your potential charitable deduction, and the estimated amount World Wildlife Fund will receive after your lifetime.

Annuitant(s): Myself Myself and another person

First Name



Yes! Show me my benefits.

Please send me the complimentary guide *A Simple Gift That Boosts Your Income.*

I would like a free, customized example of my payments and tax benefits. Please contact me for a no-obligation look. My age for the example is _____.

Is your information correct? If not, please update below.

Name

Name 2

Address Line 1

Address Line 2

City, State, Zipcode

Phone

Email

(Please provide email for future WWF communication)

©2022 WWF US | 1250 24th Street, NW | Washington, DC 20037 | 888 933 5455

A high-angle, wide shot of a surfer riding a massive, curling blue wave. The surfer is positioned on the lower right side of the wave's face, leaning forward. The wave's crest is breaking into white foam. The overall scene is dynamic and captures the power of the ocean.

Best of the Best

SPECIAL CAMPAIGNS

Drip Campaign

A multi-channel series of highly personalized stewardship, education, and conversion touchpoints to top legacy prospects.

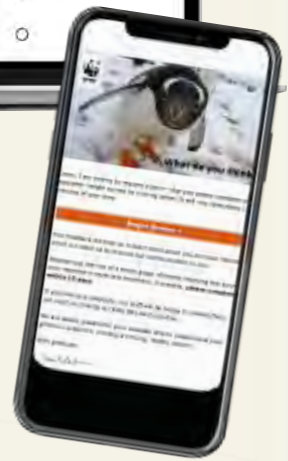
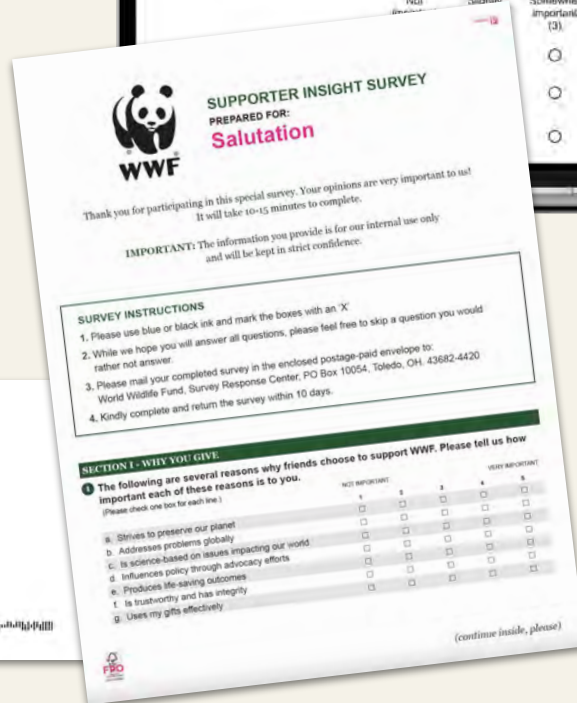
1. January - Targeted Wills
2. February - Valentine's Day Card
3. March - Concept Comparison
4. April - PG Educational Newsletter
5. May - Nurturers of Nature Card
6. June - Impact Progress Report
7. July - Appointment Request Notecard

WWF results are generating at 2000% more prolific than broad-based marketing!



Survey

- Like a gift officer discovery conversation
- Provides education, lead generation, and new legacy gift intentions
- WWF results are generating at 800% more prolific than broad-based marketing campaigns



Practice New Moves

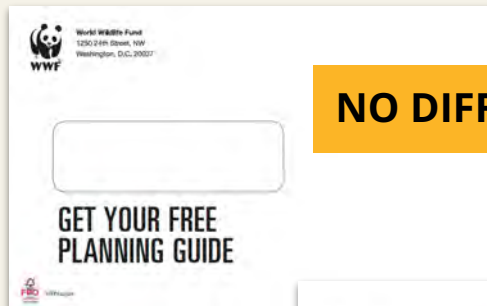
MARKETING A/B TESTING



WWF Testing

1. Teaser vs no teaser

1.



NO DIFFERENCE

2. Additional Offer insert in PG Newsletters

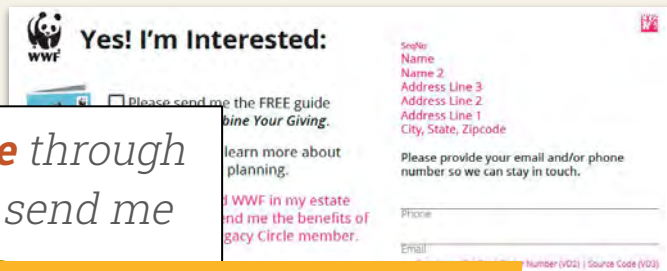


2.

DOUBLED RESPONSES

3. Philanthropic Psychology messaging on reply device

3.



I have chosen to carry on my love for wildlife through a gift to you in my will or estate plans. Please send me benefits of joining others in the Legacy Circle.

TRIPLED NEW PG NOTIFICATIONS



Hang Loose!

And get ready for the
"Millennial Monsoon!"



Q&A



Laura Spellings



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Additional Questions

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Webinar Follow-up

- Recording and slides will be made available
- Email sent tomorrow providing access



THANKS!



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