



STELTER

Getting to the heart of the matter

2012 Stelter Donor Insight Report

What Makes Them Give?

Latest Stelter Study finds influences
and activities that yield planned gifts





The Road Map to a Planned Gift

The purpose of this research was to expand upon a series of studies on American philanthropic behavior, which The Stelter Company has conducted since 2008. Specifically, this survey of U.S. residents aged 40-plus sought to:

- + Better understand how donors evolve from transactional givers to planned givers.
- + Gain insight into the types of interactions most likely to influence gift decisions.
- + Gauge the effectiveness of nonprofits' relationship-building efforts.
- + Identify the types of appeals that best mirror a donor's reasons to make a planned gift.



Definitions

CURRENT PLANNED GIVERS

People who have a planned gift in place

BEST PROSPECTS

People who say they will definitely or probably make a planned gift in the future



Planned Givers:
A Shifting
Demographic



The results of the latest Stelter Study reinforce trends revealed in The Stelter Company's previous research on the planned giving community. We find distinctions between people who have already put a planned gift in place and those who are emerging as a nonprofit's best prospects for a future planned gift. Demographics of note:

Age

Among Americans age 40+, people who currently have a planned gift in place are not significantly more likely to be young or old. The best prospects for future gifts, however, are decidedly young. A full 60 percent of best prospects are age 40 to 54, while only 10 percent of people aged 70 and older meet the criteria.

	Age 40–49	Age 50–59	Age 60–69	Age 70+
Current Planned Givers	21%	26%	27%	26%
Best Prospects	40%	32%	18%	10%

Income

Best prospects are less likely than current planned givers to report incomes of \$150,000 or more (14 percent versus 21 percent).

Region

The incidence of current planned givers versus best prospects shows little variation in the West and Northwest regions of the United States. The interior landscape, however, offers a more dynamic story. Midwesterners account for 29 percent of current planned givers, but only 21 percent of best prospects. The South has emerged as an increasingly lucrative market, with 28 percent of best prospects living there, as compared to 20 percent of current planned givers.

Marital Status


The majority of current planned givers are married (65 percent), followed by single (13 percent), widowed (13 percent) and divorced (9 percent). Singles rise in prominence, however, among best prospects (23 percent, compared to 13 percent of current planned givers).

Political Affiliation

A greater percentage of current planned givers are Republicans (32 percent) versus Democrats (25 percent). Best prospects, however, are more likely to be Democrats (33 percent) than Republicans (24 percent).



The Path to a Planned Gift

 A long history of giving is not necessarily the hallmark of a planned giver. While this study confirms the commonly held belief that loyal donors make strong candidates for planned giving, it also provides a deeper perspective. Among people who have a planned gift in place, 40 percent had been donating to a nonprofit for 10 or more years at the time of their gift.

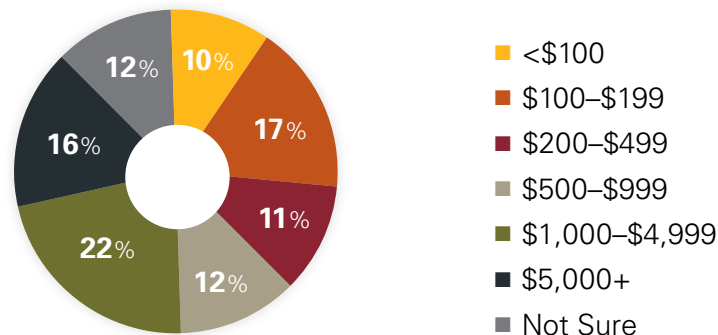
However, these data suggest that if nonprofits focus solicitations solely on their most loyal donors, they'll miss an important opportunity. Among current planned givers, 20 percent say they had been donating to the nonprofit for less than five years at the time of their gift. Another one in five (21 percent) say they had *never* donated to the charity before putting a planned gift in place. Indeed, the annual giving patterns of 41 percent of current planned givers defy the traditional loyalty model.

Planned givers may or may not make large annual gifts.

The majority of planned givers (78 percent) have also made annual gifts to the charity they support. Gift amounts, however, cannot be used as a bellwether of planned giving. Nearly 40 percent of current planned givers with a history of giving make annual donations of less than \$500.

Annual Giving

Typical cash gift amounts before putting a planned gift in place.



Once a gift decision is made, most donors act quickly.

A full 53 percent of current planned givers say less than a year passed between their decision to make a planned gift and when they finalized their planned gift documents. Gift decisions may not only be swift, but also signal

the end of a donor's planned giving activity. Among current planned givers who also make annual contributions, 72 percent say they do not intend to make any additional planned gifts, 12 percent plan to make another planned gift to a charity they currently support and 10 percent plan to benefit an additional charity.

A bequest is the most popular vehicle for a planned gift.

About half of current planned givers and best prospects say they have or will mention a nonprofit in their will. Current planned givers are slightly more likely than best prospects to say they will name a nonprofit as a beneficiary of a life insurance policy or a retirement plan account (30 percent, compared to 19 percent).

Parents tell their children of their planned gifts.

A majority of current planned givers (68 percent) have children. Of that group, 81 percent have told their children of their plans; 19 percent have not.

But people typically keep charities in the dark.

This study supports a key finding from a previous Stelter survey: A minority of planned givers inform charities of their gift (40 percent). Current planned givers, however, are slightly more likely than best prospects to say they already have or plan to alert the nonprofit of an expected gift (49 percent, compared to 36 percent).

Only 19%

of parents haven't told their children about their planned gifts.

List Selection

Best prospects are disproportionately younger, single or living in Southern states. Messages that tilt toward Democratic principles may resonate more with this group than messages that reflect Republican values.



The Influencers

Almost 1/5

of current planned givers cite family as the single most persuading interaction when it came to their decision to make a planned gift.



Many current planned givers make gift decisions independently.

We polled current planned givers on the role that seven potential “influencers”—such as conversations with individuals or communication from a nonprofit—played in their decision to make a planned gift. A significant number of current planned givers (40 percent) say they experienced none of the factors tested and made the decision on their own. The most common interaction reported was a conversation with a family member (25 percent), followed by a three-way tie between a conversation with a friend, a conversation with a person on the staff of a nonprofit, and printed or electronic communication from the charity (16 percent). Slightly less common was interaction with tax advisors (12 percent), attorneys (12 percent) and nonprofit board members (11 percent).

Family is the most important influence on planned givers.

Among current planned givers and best prospects, 18 percent cited family as the single most persuading interaction. Other influencers were cited as key by far fewer people: a friend (8 percent), an attorney (6 percent), printed or electronic communication from a nonprofit (6 percent), a person on the staff of a nonprofit (5 percent), a person on the board of a nonprofit (4 percent) and a tax advisor (4 percent).

Life transitions are not the inspiration for most planned gifts.

Current planned givers were polled about possible life events that may have coincided with the decision to put a planned gift in place. Only about one-third (36 percent) indicated that one or more of these four events took place about the time of their gift decision: a death in the family (27 percent), a windfall or inheritance (12 percent), a birth in the family (6 percent) or a job change (5 percent).

Affinity for a nonprofit’s mission trumps everything.

Not surprisingly, 83 percent of current planned givers and best prospects say they have a natural affinity to the cause the charity cares about and that was part of their decision to put a planned gift in place.



The No. 1 reason for making a planned gift? Natural affinity to the cause.



 Donor
Stewardship

**Charities could improve their standing among supporters.**

Asked to rate the attention they get from the charities they support or plan to support with a planned gift, about one in three surveyed (37 percent) describe it as excellent, with 35 percent saying good. That leaves almost one in five saying just fair (13 percent) or poor (5 percent) and 10 percent not sure they know enough to even answer the question.

When planned givers reveal themselves to a charity, it makes a difference.

Ratings are higher among current planned givers who say they have told the charity about their planned gift. A full 62 percent rate the attention they get as excellent, with most of the rest (31 percent) saying it is good. Just 4 percent say it is just fair and 3 percent say they are not sure. Current planned givers who have not told a nonprofit of their intent and intend never to tell give lower ratings—36 percent excellent and 25 percent good, with about one in four in the just fair (15 percent) or poor (11 percent) category.

Written communication is more appealing than in-person communication.

Asked about their preferences for more in-person or more written communication, a majority of those surveyed (54 percent) say neither. In contrast, 24 percent report that they would welcome more written communication, 12 percent say they would welcome more in-person communication and 5 percent say both.

Written communication is of particular interest to younger respondents (39 percent), with those aged 40 to 49 saying they would welcome written only (29 percent) or both written and in-person communication (10 percent). Older respondents are more likely than average to say neither (75 percent among those aged 70 and over—the highest of any demographic group).

Few people are members of a legacy society and even fewer aspire to be.

Just 14 percent of current planned givers and best prospects are currently members of a recognition club. The percentages rise for those with some postgraduate education (22 percent) and household incomes of \$100,000 or more (21 percent).

The idea of joining an organization for major donors and/or people who have made a planned gift to a charity was rejected by virtually every best prospect and current planned giver who was not already a member. Only 3 percent of nonmembers say they would welcome an invitation.

Only 3%

of those not currently in a legacy society would welcome an invitation.

Most people express little desire to expand relationships with other donors.

All respondents were asked if they would like “to feel more a part of a community of donors for the charities they support.” Only 10 percent said yes. The demographic group most commonly expressing this wish (albeit only a bit above average) is that of people who have never married (17 percent).

Social media can connect donors to charities.

A majority of those surveyed use at least one of the five social networks tested. Facebook leads with 39 percent, far outpacing Google Plus (19 percent), LinkedIn (17 percent), Twitter (6 percent) and MyLife (1 percent). Asked if they would be interested in using any of the five social networks mentioned in the survey to connect with a charity they currently or plan to support with a planned gift, donors again cited Facebook (17 percent) as the most popular. Higher than average proportions of major donors, current planned givers and best prospects in their 40s (24 percent each) express interest in connecting via Facebook.

Get Social

Almost one-fourth of major donors, current planned givers and best prospects in their 40s would like to connect with nonprofits on Facebook.

2/3 of respondents...
think gifts to charities make the world a better place.



 Words of
Inspiration



We tested 10 messages that support the idea of giving to charity. Only two are considered by a majority to be strongly influential in planned giving decisions. Each, however, appeals to different demographics. These messages were rated as “strongly influential” by the following percentages of people.

1. “Gifts to charities make the world a better place.” (66 percent)

Respondents with some postgraduate education and those reporting incomes of \$100,000 and up are more likely than average to spark to this message (73 percent for each group). These two groups are also more likely than average to be strongly influenced by the message that “people have an obligation to support charities” (30 percent overall, with 40 percent among higher-income and 35 percent among highly educated respondents).

This phrase is also more attractive to those who consider themselves major donors (78 percent), those who plan to give 11 percent or more of their estates to charity (75 percent), and those who have already or intend to notify the charity of their planned gift (75 percent).

2. “Giving to charity makes people feel good.” (56 percent)

This group includes higher-than-average proportions of lower-income respondents (62 percent of those with less than a \$50,000 income) and lower-educated individuals (63 percent of those with no more than a high school education). These two groups are also more likely to spark to the message “that people admire donors who give to charities” (20 percent overall, with 34 percent among the low-education group and 27 percent among the low-income group).

Tax advantages

of a planned gift rate

low as an influential messaging approach.

3. *“People can accomplish what they want by directing their charitable donations to specific causes and programs.”* (45 percent)
4. *“People receive more than they give when they donate to charity.”* (44 percent)
5. *“Giving to charity is a good way to become part of a community of like-minded people.”* (40 percent)
6. *“When people give to charities, it reduces the need for government to help people in need.”* (34 percent)
7. *“It is wise to give heirs enough to do something, but not enough to do nothing.”* (30 percent)
8. *“People have an obligation to support charities.”* (30 percent)
9. *“People admire donors who give to charities.”* (20 percent)
This group also includes higher-than-average proportions of lower-educated individuals (34 percent of those with no more than a high school education) and lower-income respondents (27 percent of those with less than a \$50,000 income).
10. *“Giving to charities is a good way to pay less in taxes.”* (17 percent)

STELTER'S



TOP 5

RECOMMENDATIONS

1. Increase communication to middle-aged supporters.

The majority of best prospects for planned gifts are age 40 to 54. It is likely a good idea to put some resources toward communicating to this group, laying the groundwork for future solicitations. And as we've seen in previous studies, even younger supporters make strong candidates.

2. Focus planned giving messages on a wider variety of donors.

Nonprofits logically focus planned giving solicitations on the wealthiest, most generous and most consistent donors. Yet more than one-in-three current planned givers were giving less than \$500 per year to the charity before putting a planned gift in place. Forty-one percent of planned givers had been donating fewer than five years—or had never made a contribution—at the time they made their gift.

These data suggest planned giving campaigns would benefit from greater visibility outside of a select inner circle. Approaching a wider pool of targets earlier in their relationship with the charity improves the chance of recruiting planned givers from people who invest in its mission emotionally and monetarily.

3. Harness the influence of family.

Although the world of influence on a donor's giving decision is fragmented, there is no more powerful persuader than a family member. Discussions with family members are the most common form of influence we find in these data. Nonprofits would benefit from finding a way to expand their

The **quality**
of nonprofit
communication
is paramount.

mailing lists to include individuals connected to their current donor base. A campaign to encourage donors to provide contact information for friends and family who are likely to be interested in the nonprofit's mission could be a valuable recruiting tool.

Social media, by its nature a powerful community-building tool, could be leveraged to introduce friends and family to the charity.

4. Provide singles with more and better attention.

Conventional wisdom suggests—and these data confirm—that people who are unmarried make particularly lucrative planned giving prospects. Yet singles report less satisfaction with the attention they receive from nonprofits than married donors.

5. Rethink legacy societies.

In many ways, planned givers are highly prized supporters for charities. Why would they not be getting stellar service? It may be that nonprofits know only about some planned gifts, not all. In fact, ratings are substantially higher among those respondents who report having told the charity they have put a planned gift in place, or that this is their intent.

They want more/better attention, but apparently not in the form of a legacy club or as part of a community of donors. They are also hesitant to invite more communication in the form of either written messages or in-person meetings. That said, the goal of the nonprofit is to establish and enhance their relationships with current and would-be donors, and that is hard to do without communicating at all, even if that is what some wish.

The obvious implication is that the quality of this—and all—communication matters. While the most elite donors may appreciate being part of a donor recognition club, these findings suggest few outside that circle are looking for that kind of experience. We heard exactly these sentiments in focus groups we conducted several years ago.

But it raises the question: What kind of experience would planned givers appreciate? Very few express interest in becoming part of a community of donors for a nonprofit. Perhaps, however, they have a limited vision of what that could mean.



Demographic Differences In Planned Giving

Age Differences in Planned Giving



Ages 40–49

More likely to say they will definitely or probably make a planned gift in the future (40 percent)—twice as many as current planned givers in their 40s (21 percent)

More likely to say they are interested in receiving more written (29 percent) and in-person communication (10 percent) from charities

Most likely to estimate that less than 10 percent of their estate will go to charities (54 percent)

More likely to be interested in using Facebook to connect with a charity (24 percent, compared to 17 percent overall)



Ages 50–59

More likely to anticipate that charities will receive gifts of 11 percent or more of their estates (40 percent, compared to 34 percent overall)

More likely to say they have a natural affinity for the cause the charity cares about (91 percent, compared to 83 percent overall)

More likely to say giving to charity makes people feel good (61 percent, compared to 56 percent overall)

More likely to say people receive more than they give when they donate to charity (54 percent, compared to 44 percent overall)

More likely to say giving to charity is a good way to become part of a community of like-minded people (48 percent, compared to 40 percent overall)

More likely to say that people admire donors who give to charities (27 percent, compared to 20 percent overall)

More likely to say that giving to charities is a good way to pay less in taxes (23 percent, compared to 17 percent overall)

Slightly more likely to say that when people give to charities, it reduces the need for government to help people in need (39 percent, compared to 34 percent overall)



Ages 60–69

More likely to say they received written information via mail or email about making a planned gift (40 percent, compared to 26 percent overall)

More likely to have been asked directly by someone affiliated with the charity to make a planned gift (22 percent, compared to 17 percent overall)



Ages 70+

More likely to say they talked to a financial professional about a planned gift (32 percent)

More likely to be a current planned giver (26 percent, compared to 10 percent of people aged 70+ who are best prospects)

More likely than average to say they are not interested in receiving more written or in-person communication from charities (75 percent, compared to 54 percent overall)



Speak to Me

People in their 40s are more likely than other age groups to say they are interested in receiving more communication from nonprofits.

Gender Differences in Planned Giving



Men

Slightly more likely to anticipate that charities will receive gifts of 11 percent or more of their estates (39 percent, compared to 34 percent overall)

Slightly more likely to have been asked directly by someone affiliated with the charity to make a planned gift (22 percent, compared to 17 percent overall)

Slightly more likely to say people have an obligation to support charities (35 percent, compared to 30 percent overall)

Slightly more likely to say that giving to charities is a good way to pay less in taxes (22 percent, compared to 17 percent overall)



Women

More likely to answer “Excellent” when asked to rate the attention they get from the charities they support or plan to support with a planned gift (42 percent, compared to 31 percent of men)

Geographic Differences in Planned Giving



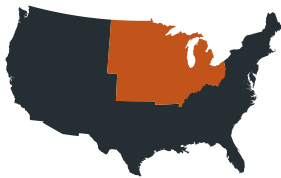
Northeast

More likely to say they received written information via mail or email about making a planned gift (37 percent, compared to 26 percent overall)

More likely to have been asked directly by someone affiliated with the charity to make a planned gift (22 percent, compared to 17 percent overall)

More likely to say they had a close connection to someone on the staff of the charity as they decided to put a planned gift in place (37 percent, compared to 27 percent overall)

More responsive to the message about giving making people feel good (64 percent, compared to 56 percent overall) and about charitable giving reducing government dependence (49 percent, compared to 34 percent overall)



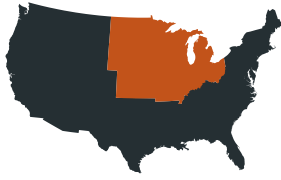
Midwest

More likely than average to be a current planned giver (29 percent, compared to 21 percent of prospects)

More likely to indicate that as they decided to put a planned gift in place, they had a close connection to someone on the board of directors of the charity (22 percent, compared to 17 percent overall); had a close connection to someone on the staff of the charity (36 percent, compared to 27 percent overall); and talked to a financial advisor, attorney or CPA about making a planned gift (28 percent, compared to 23 percent overall)

More likely to have told the charity about their planned gift, or plan to tell them in the future (48 percent, compared to 40 percent overall)

More likely than average to say they are not interested in more written or in-person communication from charities (65 percent, compared to 54 percent overall)



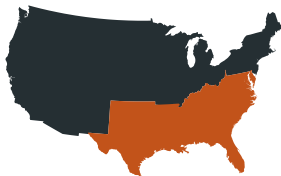
Midwest continued

More likely than average to say they do not consider themselves a major donor to charities they currently support through occasional donations or through a planned gift (74 percent, compared to 67 percent overall)

Slightly more likely to say people have an obligation to support charities (35 percent, compared to 30 percent overall)

Slightly more likely to say they would not like to feel more a part of a community of donors for a charity they support (93 percent, compared to 88 percent overall)

More likely to say they have or will set up a gift in their will (57 percent, compared to 49 percent overall)

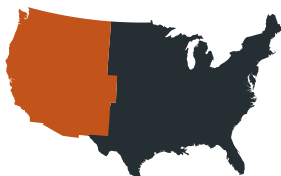


South

More likely than average to be a best prospect for planned giving (28 percent, compared to 20 percent of current donors)

More likely to say they would like to feel more a part of a community of donors for a charity they support (16 percent, compared to 10 percent overall)

Slightly more likely to spark to messages about not giving heirs enough to do nothing (35 percent, compared to 30 percent overall) and the tax benefits of charitable giving (22 percent, compared to 17 percent overall)



West

More likely to indicate that they received something in the mail or via email and visited the charity's website as they decided to put a planned gift in place (24 percent, compared to 17 percent overall)

Marital Status and Planned Giving



Single/Never Married

More likely to say they would like to feel more a part of a community of donors for the charities they support (17 percent, compared to 10 percent overall)

More likely to be a best prospect for a planned gift (23 percent, compared to 13 percent of singles who are current donors)

More likely to anticipate that charities will receive gifts of 11 percent or more of their estates (41 percent, compared to 34 percent overall)

More likely to say giving to charity makes people feel good (67 percent, compared to 56 percent overall)

More likely to say that people admire donors who give to charities (26 percent, compared to 20 percent overall)

More likely to say they have or will name a charity as beneficiary of a life insurance policy or a retirement account (29 percent, compared to 22 percent overall)

More likely to answer “Just fair” when asked to rate the attention they get from the charities they support or plan to support with a planned gift (19 percent, compared to 12 percent of those who are married and 10 percent of those widowed or divorced)



Married

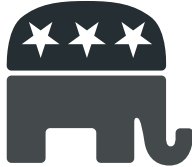
More likely to answer “Excellent” when asked to rate the attention they get from the charities they support or plan to support with a planned gift (43 percent, compared to 28 percent of those never married and 29 percent of those widowed or divorced)

Most likely to say they made occasional cash contributions for a few years before deciding to make a planned gift (79 percent, compared to 74 percent overall)

Most likely to say they have told the charity about their planned gift, or plan to tell them in the future (45 percent, compared to 40 percent overall)

Most likely to say they talked to a financial advisor, attorney or CPA about making a planned gift (28 percent, compared to 23 percent overall)

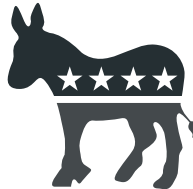
Political Party Identification and Planned Giving



Republican

More likely than average to be a current planned giver (32 percent, compared to 24 percent of prospects)

More likely than average to spark to the message about charitable giving reducing the need for government to help people in need (44 percent, compared to 34 percent overall)



Democrat

More likely than average to be a best prospect for planned giving (33 percent, compared to 25 percent of current donors)

More likely to indicate that as they decided to put a planned gift in place, they received written information via mail or email about making a planned gift (32 percent, compared to 26 percent overall) and had a close connection to someone on the staff of the charity (34 percent, compared to 27 percent overall)

More likely to say giving to charity makes people feel good (61 percent, compared to 56 percent overall)



Independent

More likely to say they have told the charity about their planned gift, or plan to tell them in the future (50 percent, compared to 40 percent overall)

Slightly more likely than average to anticipate charities will get 11 percent or more of their estates (39 percent, compared to 34 percent overall)

Income and Planned Giving



\$150,000+

More likely to have already put a planned gift in place (21 percent, compared to 14 percent of prospects)



\$100,000+

More likely than average to say they talked to a financial professional about a planned gift (32 percent, compared to 23 percent overall)

More likely to indicate that as they decided to put a planned gift in place, they had a close connection to someone on the board of directors of the charity (24 percent, compared to 17 percent overall)

Slightly more likely to have told the charity about their planned gift, or plan to tell them in the future (45 percent, compared to 40 percent overall)

More likely to answer “Excellent” when asked to rate the attention they get from the charities they support or plan to support with a planned gift (44 percent, compared to 29 percent of those reporting an income of \$50,000 or less)

Slightly more likely than average to think of themselves as a major donor (38 percent, compared to 32 percent overall)

More likely to say people have an obligation to support charities (40 percent, compared to 30 percent overall)

More likely to say that gifts to charities make the world a better place (73 percent, compared to 66 percent overall)

More likely to say people can accomplish what they want by directing their charitable donations to specific causes and programs (54 percent, compared to 45 percent overall)

More likely to say they have or will set up a gift to charity in their will (58 percent, compared to 49 percent overall)

More likely than average to say they are not interested in receiving more written or in-person communication from charities (60 percent, compared to 54 percent overall)



\$50,000–\$99,999

More likely to say they received something in the mail or email that led them to the charity’s website (22 percent, compared to 17 percent overall)

Slightly more likely to say they had a natural affinity for the cause the charity cares about (88 percent, compared to 83 percent overall)

Slightly more likely to say they made occasional cash contributions for a few years before deciding to make a planned gift (79 percent, compared to 74 percent overall)

More likely to say they have or will set up a charitable gift annuity (20 percent, compared to 12 percent overall)

More likely than average to say they do not consider themselves a major donor (75 percent, compared to 67 percent overall)

More likely to say they would not like to feel more a part of a community of donors for a charity they support (94 percent, compared to 88 percent overall)

More likely than average to say they would welcome more written communication from the charities they support or plan to support with a planned gift (30 percent, compared to 24 percent overall)



Under \$50,000

More likely to say people admire donors who give to charities (27 percent, compared to 20 percent overall)

More likely to say giving to charity makes people feel good (62 percent, compared to 56 percent overall)

Slightly more likely to say they would like to feel more a part of a community of donors for a charity they support (15 percent, compared to 10 percent overall)

Education and Planned Giving



High School Grad or Less

Much more likely to say people admire donors who give to charities (34 percent, compared to 20 percent overall)

More likely to say giving to charity makes people feel good (63 percent, compared to 56 percent overall)

More likely to say giving to charity is a good way to become part of a community of like-minded people (40 percent, compared to 34 percent overall)

More likely to say that when people give to charities, it reduces the need for government to help people in need (40 percent, compared to 34 percent overall)



College Degree

More likely than average to anticipate charities will get 11 percent or more of their estates (40 percent, compared to 34 percent overall)

More likely to indicate that as they decide to put a planned gift in place, this happens: they had a natural affinity for the cause the charity cares about (92 percent, compared to 83 percent overall), they made occasional cash contributions for a few years before deciding to make a planned gift (80 percent, compared to 74 percent overall), they had a close connection to someone on the board of directors of the charity (23 percent, compared to 17 percent overall), they had a close connection to someone on the staff of the charity (33 percent, compared to 27 percent overall) and they received something in the mail or email and visited the charity's website (22 percent, compared to 17 percent overall)



Post-Graduate Work or Degree

Slightly more likely to say people have an obligation to support charities (35 percent, compared to 30 percent overall)

More likely to say that gifts to charities make the world a better place (73 percent, compared to 66 percent overall)

More likely to say people can accomplish what they want by directing their charitable donations to specific causes and programs (54 percent, compared to 45 percent overall)

More likely to say they have or will set up a gift to charity in their will (57 percent, compared to 49 percent overall)

About the Study

This poll was conducted June 17 through June 25, 2012, for The Stelter Company by Selzer & Company of Des Moines, Iowa. The poll is based on a telephone survey of 401 adults aged 40 and older defined as current or prospective planned givers. Landline and cellphone samples were included. Interviews lasted about 15 minutes. To qualify, respondents were defined as prospective planned givers for the purpose of this study by indicating they will definitely or probably include a gift to a nonprofit organization in their will or a planned gift to a nonprofit organization in the future. Current planned givers indicated they currently have a gift in their will or a planned gift to a nonprofit organization in place.

Age and sex demographic information were collected on all respondents who passed the age screen. The full data file was then weighted by age and sex to the proportions found in the 2010 census data for the United States. Findings from this report are based on the subgroup of 401 current and prospective planned givers.

The margin of error for the sample of 401 American adults ages 40 and older who are current or prospective planned givers is plus or minus 4.9 percentage points. This means if this survey were repeated using the same questions and the same methodology, 19 times out of 20 the findings would not vary from the percentages shown here by more than plus or minus 4.9 percentage points.

About The Stelter Company

Stelter provides personal philanthropy marketing services to over 2,000 leading nonprofits nationwide, leveraging its understanding of philanthropic behavior to micro-target prospects through direct mail, email and Web solutions. Headquartered in Des Moines, Iowa, Stelter has a unique culture built around giving from the heart and encourages its employees to exemplify the company's dedication to personal philanthropy. For more information, please visit www.stelter.com.

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