



MarkeTeam's Approach to

PLANNED GIVING

Stewardship of donors towards Planned Giving vehicles (bequests, charitable gift annuities, donor advised funds) should remain a top priority for all non-profits.

Although there is merit to targeting older donors as the primary source of Planned Giving prospects, MarkeTeam believes there is opportunity in communicating to all generations when it comes to Planned Giving education: 'motivating' and 'transitioning' Matures and Boomers while 'recruiting' and 'educating' Gen Xers and Millennials.



Planned Giving Programs should include:

1. Targeting donors with MarkeTeam's Planned Giving Model to identify best prospects.
2. Overlaying paid social media during peak fundraising seasons to top donor prospects.
3. Creating a dedicated mailing to promote Planned Giving to top modeled donors.
4. Creating informational inserts in acknowledgments to drive awareness and support established Planned Giving options.
5. Optimizing your Planned Giving section on your website.
6. Coordinating messages across direct mail and email.

PLANNED GIVING MODELS

MarkeTeam has vast experience with specialized Planned Giving model development including Bequest, Young Bequest, Charitable Gift Annuity and Real Estate.

MarkeTeam is able to identify indicators specific to donors that have made Planned Gifts to the non-profit in the past in order to find other donors with those indicators. Although some overlap exists between the different Planned Giving models, there are nuances between these pools that our modeling techniques will discriminate.



Contact us at inquiries@mkteam.com to decide if a customized Planned Giving program could be right for your organization!



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