

# FIVE STEPS TO A SUCCESSFUL PLANNED GIVING PROGRAM

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# What is Planned Giving?

## ➤ **Planned Gifts**

Transfer of assets that, in addition to having a charitable dimension, impact financial planning and/or estate planning.

## ➤ **Deferred Gifts**

Impact is not fully realized until some future date, generally at the death of the donor(s).

## ➤ **Life Income Gifts**

Irrevocable transfers of assets creating vehicles whereby donors receive income for themselves or their designees, favorable tax treatment and provide support to a charity of their choice.

# 5 Steps to Building a Successful Planned Giving Program

- Craft and make the case
- Choose and equip leaders
- Build policy infrastructure
- Listen to and know your prospects
- Cultivate and educate

# The Case for Support

- **Values** – The immutable principles that animate our community's life
- **Vision** – Definition of success in mission
- **Outcomes** – The impact on people and communities
- **Strategy** – How we make it happen
- **Testimonials** – The stories of our success
- **The Ask** – Unapologetic and tailored

# Planned Giving Leadership

- Financial commitment from team members
- Theological grounding
- Basic knowledge of Legacy Giving
- Connection with stewardship and trustees

# Endowment Policies

## ➤ Gift Acceptance Policy

- What gifts will we decline?

## ➤ Investment Policy

- How and where will monies be invested?

## ➤ Spending Policy

- For what purpose(s) will funds be expanded?
- How will we insure sustainability?

# Cultivating and Soliciting Donors

- **Identify**      Who is our audience – specifically? What do they value that will encourage a gift?
- **Segment**      How do we respect the level of interest, capacity and the nature of the relationship of our donors and prospects by treating them appropriately?
- **Cultivate**      How will we approach different donors? How do we build confidence that donor gifts will be according to their wishes? How do we provide an entry point for education and conversation?
- **Solicit**      How will we and who will?
- **Steward**      How do we continue to cultivate donors *after* their commitment?

# Challenges

- The changing views of legacy
- The changing landscape for the church
- New understanding of stewardship
- Articulating a compelling vision in a competitive environment



# Questions?

Send questions about the topic of this webinar to:

[marketing@ucfunds.org](mailto:marketing@ucfunds.org)

# Contact Us

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