

A SAMPLE MONTH OF

Planned Giving MARKETING

<p>Post planned giving education on social media!</p> 	<p>Build out on your organization's planned giving Conversation Initiation form to make a list of those who should be contacted.</p>	<p>Include a "WHY I GIVE" article in your newsletter or magazine this month to thank a donor and encourage others.</p>	<p>Is it time to send our your quarterly, personalized "thank you" to those who have included your organization in their estate plan?</p>	<p>Post a planned giving SPECIAL EVENT on social media. (See the list below!)</p>	<p>Include planned giving education in an email campaign this week.</p> 	<p>Check your website analytics to see how engaged visitors are with your planned giving content.</p>
<p>Host an event or tour and include a planned giving message!</p>	<p>Include planned giving education in an email campaign this week.</p> 	<p>Post planned giving education on social media!</p> 	<p>Share a "WHY I GIVE" story with donors to help encourage others to participate in planned giving opportunities.</p>	<p>Schedule a donor conversation about your organization's future vision and invite a planned giving advisor to join you.</p>	<p>Reach out to a donor and request a meeting to explain the opportunity of tax-wise, planned giving.</p>	<p>Share your planned giving website link with a donor today to help them learn more about gifts of life insurance.</p>
<p>Ensure that your remit envelopes include an opportunity to request information about planned giving.</p>	<p>Contact the next name on your organization's planned giving Conversation Initiation form.</p>	<p>Post a planned giving educational video on social media this week.</p>	<p>Discuss a CGA with a donor today to help educate them on this opportunity. Send them your website link to learn more!</p>	<p>Include planned giving education in an email campaign this week.</p> 	<p>Post planned giving education on social media!</p> 	<p>Include a planned giving educational piece in your newsletter or magazine this month.</p>
<p>Post a planned giving SPECIAL EVENT on social media. (See the list below!)</p>	<p>Include planned giving messages in your monthly receipting of cash gifts (printed and direct mailed OR emailed).</p>	<p>Contact the next name on your organization's planned giving Conversation Initiation form.</p>	<p>Ensure your fundraising appeal has a planned giving message in the PS!</p>	<p>Check your stock of planned giving brochures. Order more if needed!</p>	<p>Celebrate a special milestone or holiday with a planned giving and legacy message.</p>	<p>Post planned giving education on social media!</p> 
<p>Post planned giving education on social media!</p> 	<p>Share a "WHY I GIVE" story with donors to help encourage others to participate in planned giving opportunities.</p>	<p>Post planned giving education on social media!</p> 	<p>Include planned giving education in an email campaign this week.</p> 	<p>Post a compelling "did you know" fact about planned giving on social media this week.</p>	<p>Check your stock of receipt stuffers. Order more if needed!</p>	<p>Invite a planned giving advisor to speak at your upcoming banquet to share inspirational donor stories about planned giving.</p>

IMPORTANT DATES

- Celebrate "Thankuary" in **January** where you promote GRATITUDE and don't make any asks!
- National Volunteer Month in **April** is a month to recognize and promote volunteerism, mentioning planned giving as a way to continue your support.
- Tax Day on **April 15** can be a reminder for donors about tax-wise charitable giving.
- National Nonprofit Day on **August 17** is a day to celebrate and recognize the work of nonprofits.
- International Day of Charity on **September 5** is an internationally recognized day to highlight the role of charity.
- Close of Fiscal Year is on **June 30** for many nonprofits.
- Make A Will Month in **August** is a great reminder to donors to write or update their will with a bequest to your organization.
- Donor Advised Fund Day on **October 9** can be an opportunity to educate donors about this giving strategy.
- Financial Planning Month is **October** is a great time to promote Faithward Advisors.
- National Estate Planning Week is **October 20-26**; remind donors to include you in their estate plans.
- The **Tuesday after Thanksgiving** is Giving Tuesday, a great opportunity to tuck in a Planned Giving message.