

7 Fast Facts to Help Fundraisers Make the Case for Drip-Feed Legacy Marketing

1. The opportunity for your organization is massive. 43.9% of nonprofits still don't focus any fundraising/gift nurturing on gifts in wills or estate gifts. And yet... more than 85% of all planned gifts are made via a will or a trust, meaning charitable bequests.
2. Depending on your source, the average size of a charitable bequest is between \$37,000 (How to Love Your Donors to Death, Stephen Pidgeon, 2015) and \$78,360 (2020). That is as much as 1,000X what a donor might give while living. And nearly two out of every 10 wills include more than one bequest.
3. If you think a charitable bequest will decrease annual gifts, think again. After making an estate gift, a donor's annual gifts increase by more than 75%, on average, in following years.
4. Don't stop for coronavirus. In August 2020, will-making website FreeWill saw a 295.21% increase in charitable bequests made over the same month in 2019.
5. As of 2017, giving by bequest accounted for 9% of all charitable donations, or \$35.7 billion, an increase of \$12.3 billion over 2012.
6. Get busy now. Russell James, professor at Texas Tech University, estimates that without nonprofits working to encourage planned gifts, as much as 90% of donor mortality (the big generational wealth transfer everyone's waiting for) will "simply result in lost current giving."
7. Don't stop. A 20-year study shows that donor life events dictate when a bequest will be added, and you need to be top of mind. For nearly seven out of 10 donors in the study, adding a charitable bequest happened within the final five years before passing.

Compiled by Lisa Sargent, president of fundraising consultancy Lisa Sargent Communications, for the Chronicle of Philanthropy webinar, "How to Boost Your Planned Giving Program," on October 22, 2020

7 Rules for Marketing Planned Gifts to Donors

By [Lisa Schohl](#) JANUARY 5, 2021

Bequests and other planned gifts provide a significant source of revenue for nonprofits. But many donors don't include charities in their will simply because they were never asked, says Lisa Sargent, founder of an eponymous [fundraising consultancy](#).

As long as you start talking about legacy gifts with donors, she says, "gifts in wills do come in — and sometimes they come in as early as six, eight, 10 months after you start [asking]."

You don't need to hire an outside firm or make a huge financial investment to expand your planned-giving program, she says. "Even if you're a small-to-midsize nonprofit, you can absolutely do this, and you can do this with the communications you have at hand."

To get started, find ways to weave messages about planned gifts into your existing outreach materials — an approach Sargent calls "legacy drip-feed marketing" — rather than creating new communications focused on this form of giving.

Use language donors will understand. "When we say 'planned giving,' that's really for nonprofit professionals," she says. "Most donors think of it as 'gifts in wills.'"

But don't feel you need to mention every type of legacy gift that exists. If you talk only about bequests, she says, "you've managed to cover more than 85 percent of how all planned gifts are made, which is by a will or a trust."

Here are seven hard-and-fast rules for promoting bequests to donors, which Sargent compiled for the recent *Chronicle* webinar [How to Boost Your Planned Giving Program](#).

Keep it simple: Don't use the term "planned giving," and don't worry about introducing every complex legacy-giving vehicle you offer. As Professor Russell James of Texas Tech University recommends, [use words that resonate with donors](#): gift planning, will planning, legacy planning, gifts in wills, trusts, or retirement accounts.

Keep donors in control. Remind them they can include a gift to charity in their will, after their loved ones have been taken care of, as a remainder or percentage of their estate.

Make leaving a bequest easy by giving donors sample language. Remind them that making a will is as simple as a trip to their attorney or trusted online will-making website. Then provide sample language to help them.

Don't make donors tell you they are making a planned gift. Remember, they are in control. Use language such as, "Letting us know you've taken the generous step of remembering our nonprofit in your will is always up to you. But we'd love to be able to show our gratitude and keep you updated on the work."

Emphasize the benefits to the donor. For example, you can say: "Make a gift in your will ...

- ... to a cause that has been important to you in your life."
- ... and let your values live on."
- ... and in your good name, people who are homeless and hungry will always have a place to turn."
- ... and 'keep nature healthy for years to come,'" as the [Nature Conservancy's legacy-giving landing page](#) says.

Emphasize the value of legacies of *all* sizes. Make sure donors know they "don't have to be wealthy" to leave a gift in their will that will echo for generations. Show examples of how smaller legacies can work wonders.

Use the right kind of social proof, as [James suggests](#). For example, say, "Many caring supporters like to leave a gift in their will to causes they're passionate about." And share stories of other donors who've left legacies. Just remember, if I as a donor don't "see myself" in the story you choose, it could backfire, Sargent says.