

**26** REALLY  
INTERESTING  
PLANNED GIVING  
**MARKETING**  
CHARTS, STATS, AND GRAPHS

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# ABOUT THIS REPORT

According to research of giving patterns since 1966 compiled by the Giving USA Foundation, only bequests averaged an increase during recessionary periods. All other types of giving either remained static or reported declines.

But is your planned giving program getting its fair share of the marketing budget?

We scoured the internet to find the following awesome information. And, although we can't take credit for the research, we can take credit for the pretty charts!

**26 REALLY**  
INTERESTING  
**PLANNED GIVING**  
**MARKETING**  
CHARTS, STATS, AND GRAPHS



GREG WARNER  
CEO, MARKETSMART

So feel free to share this report with colleagues and friends (including your board).

And when you're ready to engage in serious marketing to find hidden gifts, generate leads and cultivate relationships, we hope you'll give us a call. After all, our mission is to help further your mission.

**ENJOY THE REPORT!**



# THE GREATEST TRANSFER OF WEALTH **EVER** IS UPON US

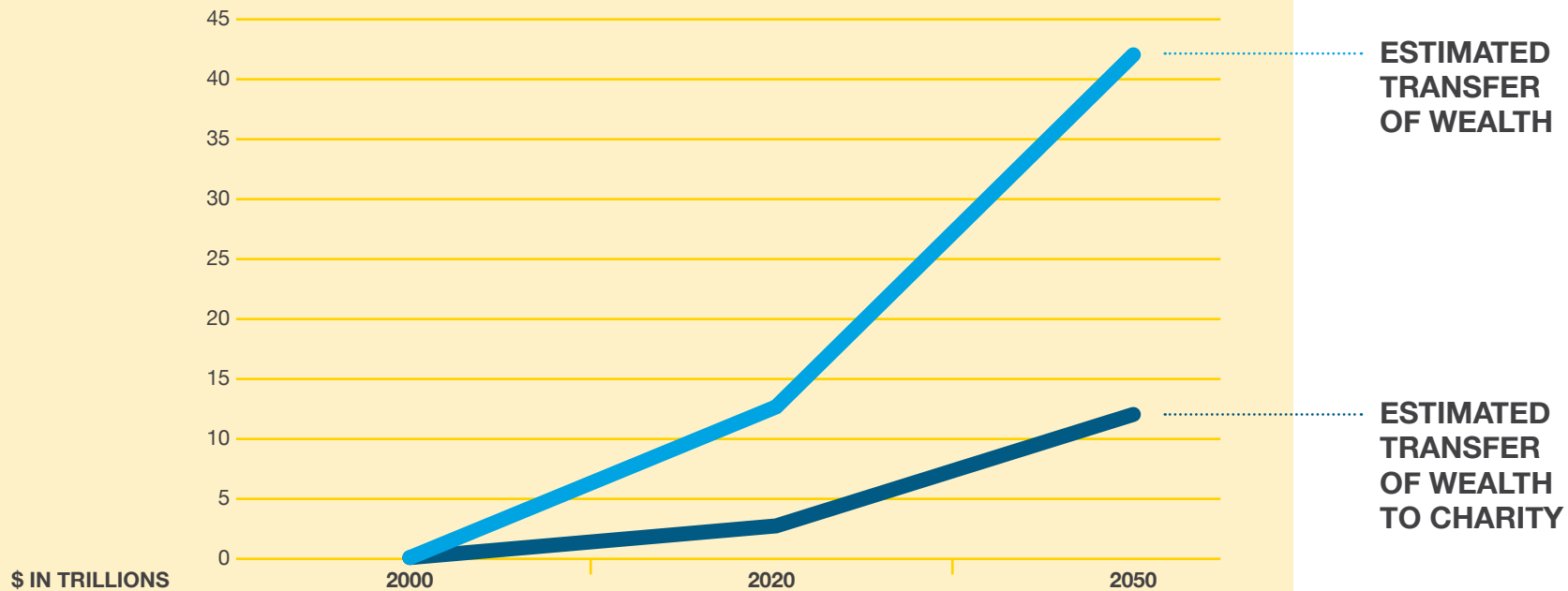
**\$41 TRILLION**  
IS EXPECTED TO TRANSFER  
EVEN IN LIGHT OF  
CURRENT ECONOMIC  
CONDITIONS.



Why the \$41 Trillion Wealth Transfer is Still Valid: A Review of Challenges and Questions. Published in The National Committee on Planned Giving's The Journal of Gift Planning. Vol. 7, no. 1, 1st Quarter 2003. pp. 11-15, 47-50.

# \$12 TRILLION WILL GO TO CHARITY

## THE INTERGENERATIONAL TRANSFER OF WEALTH 2000-2050



Family Philanthropy And the Intergenerational Transfer of Wealth  
Published by the Community Foundation R&D Incubator. Funded by  
Council on Foundations Community Foundation Leadership Team,  
W.K. Kellogg Foundation, C.S. Mott Foundation, and Michigan  
Community Foundations.

# OR \$24.8 TRILLION COULD GO TO CHARITY

	LOW ESTIMATE (2% secular real growth in wealth)	MIDDLE ESTIMATE (3% secular real growth in wealth)	HIGH ESTIMATE (4% secular real growth in wealth)
<i>Number of Estates</i>	87,839,311	87,839,311	87,839,311
<i>Value of Estates*</i>	\$40.6	\$72.9	\$136.2
<i>Estate Fees</i>	\$1.6	\$2.9	\$5.5
<i>Estate Taxes</i>	\$8.5	\$18.0	\$40.6
<i>Bequests to Charity</i>	\$6.0	\$11.6	<b>\$24.8</b>
<i>Bequest to Heirs</i>	\$24.6	\$40.4	\$65.3



Derived from tables in *Millionaires and the Millennium: New Estimates of the Forthcoming Wealth Transfer and the Prospects for a Golden Age of Philanthropy*, Schervish, Paul G. and Havens, John J., Social Welfare Research Institute, Boston College, Boston, MA, October 1999.

\* All dollar values are in trillions of 1998 dollars.

“FOR THOSE WHO THINK THE GENERATIONAL TRANSFER WILL AUTOMATICALLY FLOOD THEIR ORGANIZATION WITH RESOURCES,

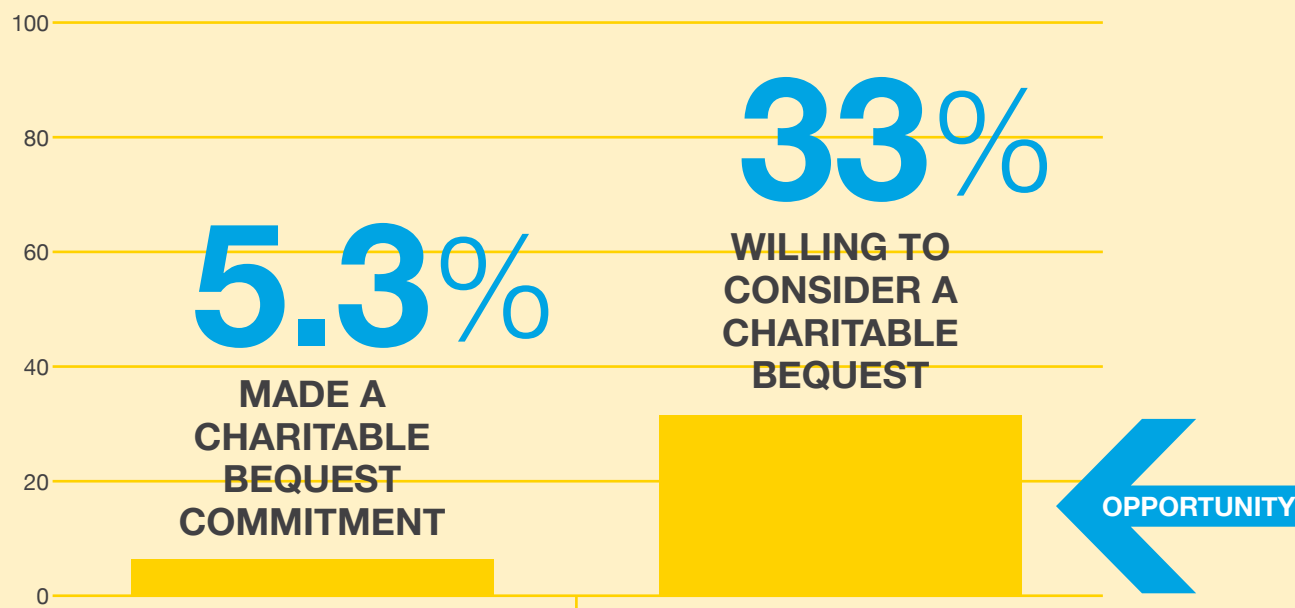
**IT’S TIME TO THINK AGAIN.**

WITHOUT PUTTING IN THE HARD WORK OF GENERATING THESE PLANNED GIFTS,

**90%**

OF DONOR MORTALITY WILL SIMPLY RESULT IN LOST CURRENT GIVING.”

# ONLY 5.3% OF OLDER AMERICANS HAVE MADE A CHARITABLE BEQUEST COMMITMENT, WHILE 33% ARE WILLING TO CONSIDER SUCH A GIFT



AMONG THOSE **OVER AGE 50** WHO  
WERE DONATING MORE THAN \$500/YEAR  
TO CHARITABLE ORGANIZATIONS...

< **9.5%**

**LESS THAN 9.5% HAD A  
CHARITABLE ESTATE PLAN.**



ULTIMATELY ONLY 10%-12%  
OF DONORS WILL DIE  
WITH ANY CHARITABLE  
ESTATE PROVISION

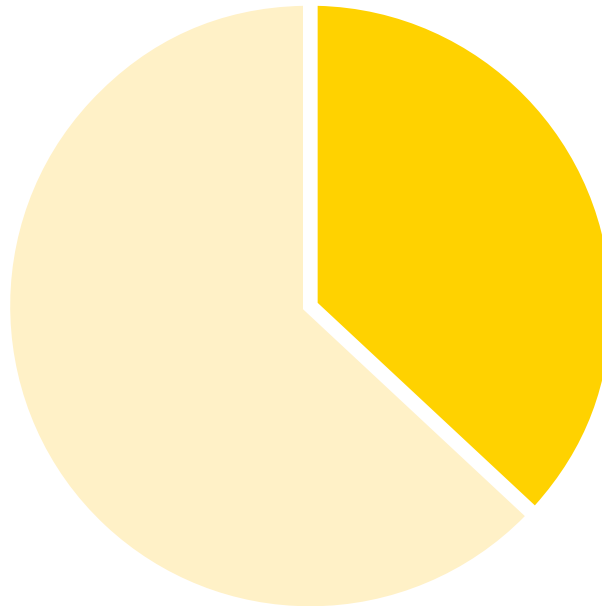
10-12%



Causes and Correlates of Charitable Giving in Estate Planning:  
A Cross-Sectional and Longitudinal Examination of Older  
Adults—Russell N. James III, J.D., Ph.D.

# ONLY 37% OF THOSE OVER AGE 30 SAY THEY ARE FAMILIAR WITH THE TERM “PLANNED GIVING”

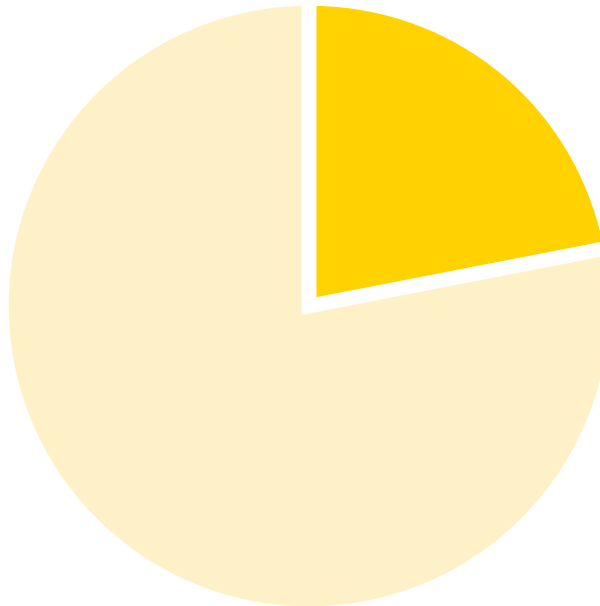
**63%**  
UNFAMILIAR  
WITH THE TERM  
“PLANNED GIVING”



**37%**  
FAMILIAR WITH  
THE TERM  
“PLANNED GIVING”

# ONLY 22% OF THOSE OVER AGE 30 REPORT THAT THEY HAVE BEEN APPROACHED TO CONSIDER A PLANNED GIFT

**78%**  
HAVE NOT BEEN  
APPROACHED  
TO CONSIDER A  
PLANNED GIFT



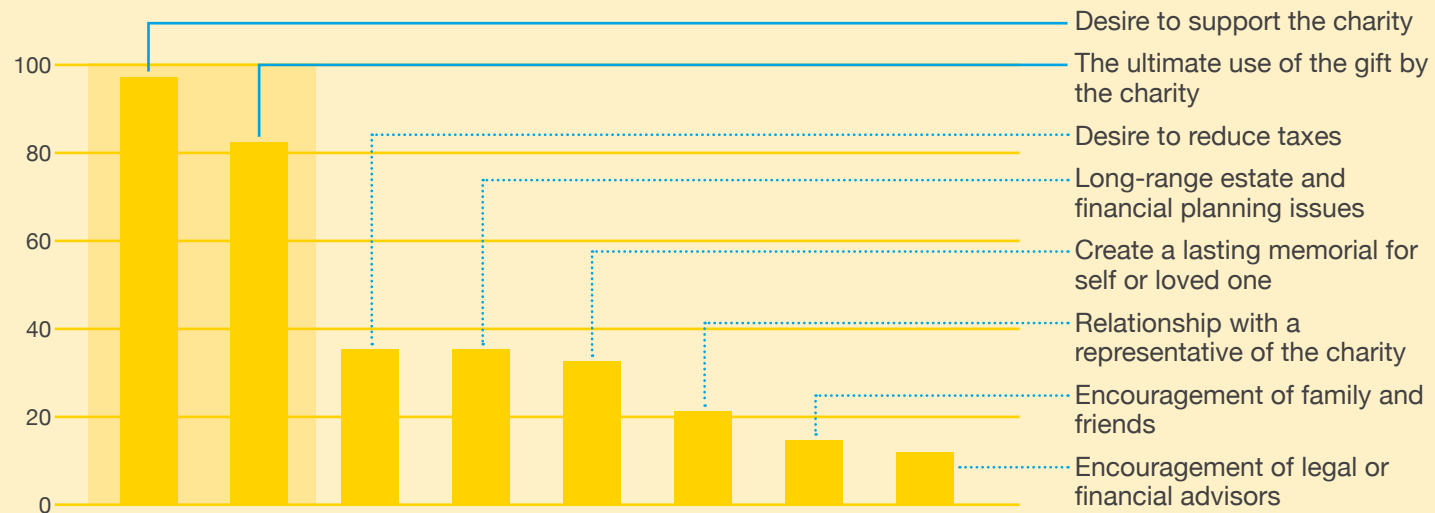
**22%**  
HAVE BEEN  
APPROACHED  
TO CONSIDER A  
PLANNED GIFT



# TOP REASONS DONORS MAKE PLANNED GIFTS:

97% DESIRE TO SUPPORT THE CHARITY

82% THE ULTIMATE USE OF THE GIFT BY THE CHARITY

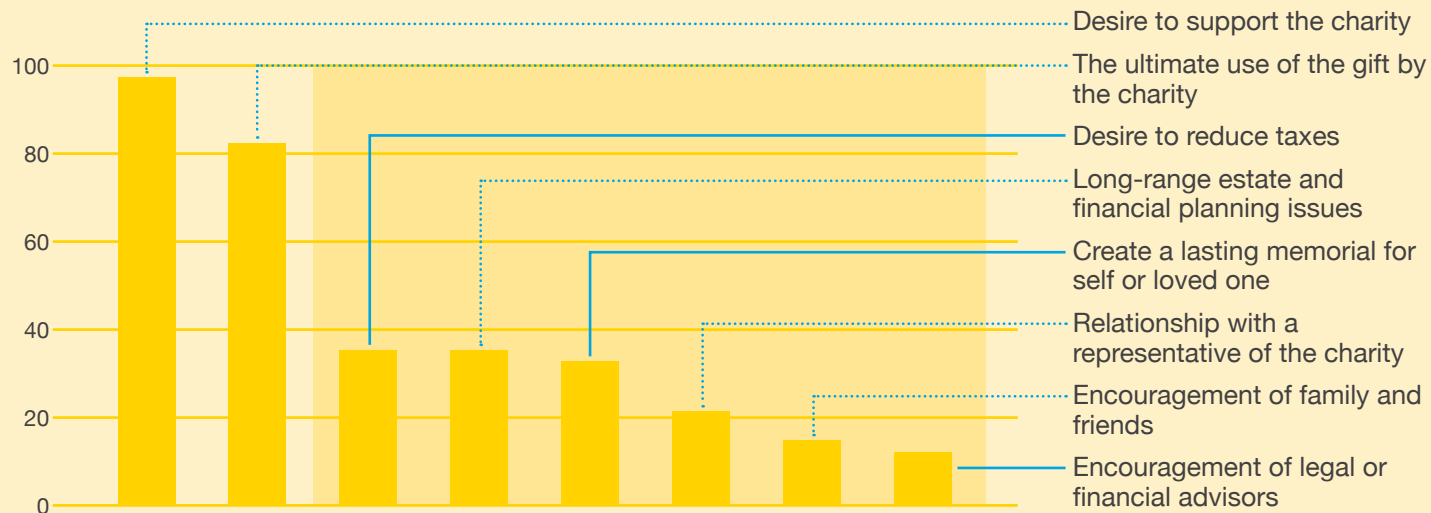


# TOP REASONS DONORS MAKE PLANNED GIFTS:

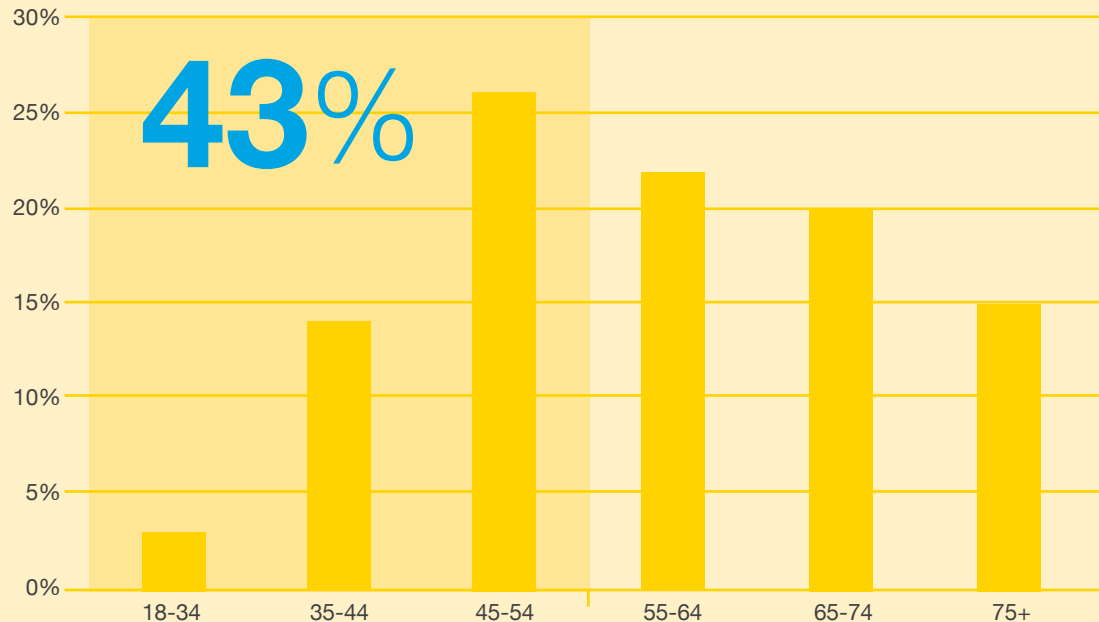
35% DESIRE TO REDUCE TAXES

33% CREATE A LASTING MEMORIAL FOR SELF OR LOVED ONE

12% ENCOURAGEMENT OF LEGAL OR FINANCIAL ADVISORS

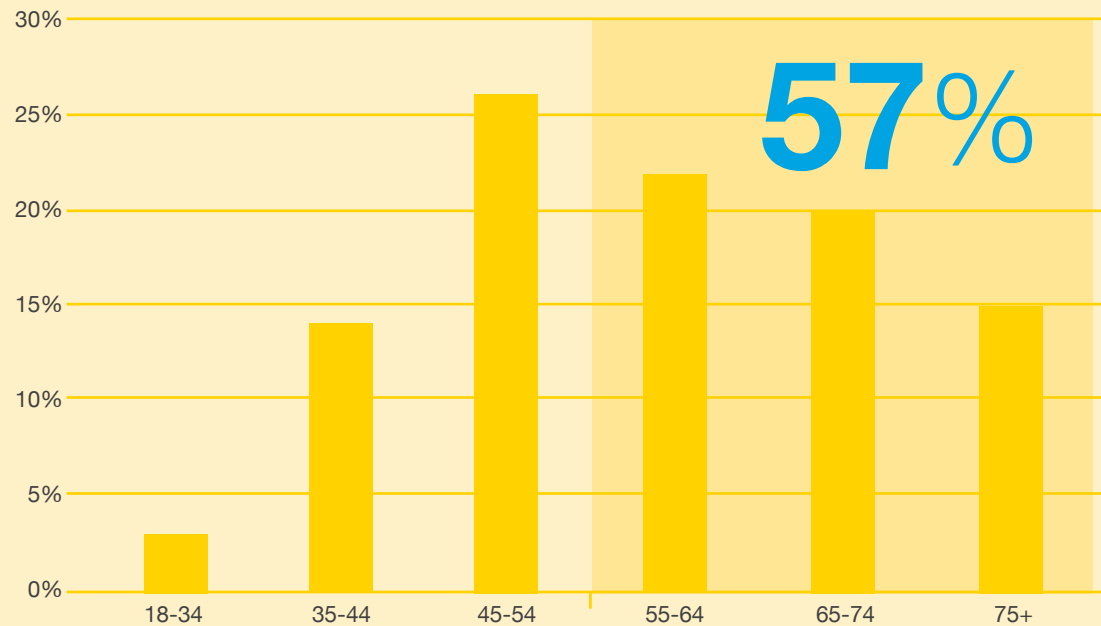


# 43% OF INDIVIDUALS SETTING UP GIFTS TO CHARITY IN THEIR WILLS WERE FOUND TO BE UNDER 55



Source: NCPG Planned Giving in the United States, National Committee on Planned Giving, Indianapolis, Indiana.

# 57% WERE OVER 55



THE **AVERAGE AGE** WHEN MOST  
DONORS **MADE A WILL** WAS  
FOUND TO BE **44**, WHILE THE AGE  
AT **FIRST BEQUEST** WAS **49**

**44** = **FIRST WILL**

**49** = **FIRST BEQUEST**





WHILE ONLY **31%** WERE FOUND  
**NEVER TO HAVE REVISED THEIR  
WILLS**, NEARLY **75%** WERE FOUND  
**NEVER TO HAVE REVISED THEIR  
CHARITABLE BEQUESTS**

**31%**

**NEVER REVISED  
THEIR WILLS**

**75%**

**NEVER REVISED THEIR  
CHARITABLE BEQUESTS**

AMONG THOSE THAT HAD  
REVISED THEIR WILLS, **MOST**  
**INCREASED THE AMOUNT**  
**OF THE BEQUEST**



**FEWER THAN 10%** WERE FOUND  
TO HAVE **DECREASED** THE AMOUNT,  
AND THIS WAS MOST COMMON  
IN THE LOWEST INCOME GROUP  
(\$35,000 OR LESS)



THE MOST COMMON REASON  
FOR CHANGING THE AMOUNT  
OF THE BEQUEST WAS A  
**CHANGE IN ASSETS**

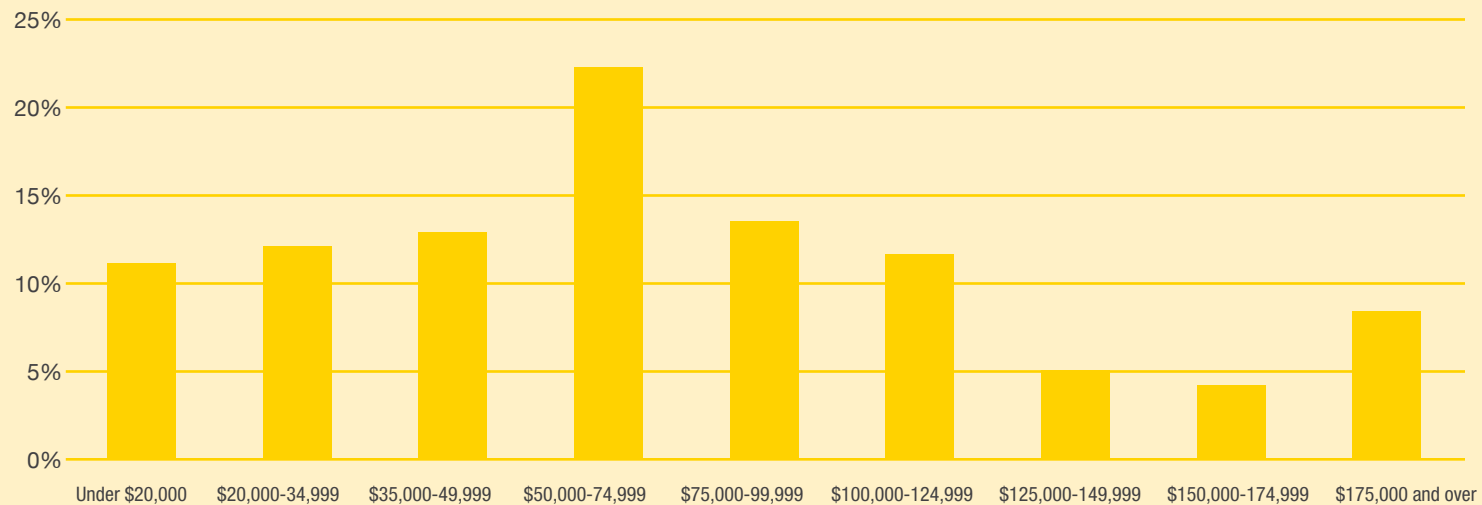


ONLY 1% OF AMERICANS HAVE  
A CHARITABLE REMAINDER  
TRUST, WHILE 5% ARE  
WILLING TO CONSIDER ONE

1% vs. 5%

# BEQUEST DONORS ARE FOUND AMONG ALL INCOME CATEGORIES

**% OF BEQUEST DONORS**



Bequest Donors **Median** Income \$60,400  
Bequest Donors **Mean** Income \$75,900



ON AVERAGE, **80-90%** OF  
PLANNED GIFTS COME IN THE  
FORM OF SIMPLE BEQUESTS

**80-90%**

# A 15 YEAR STUDY OF RECORDS AT A LARGE, NATIONAL NONPROFIT WITH A MAILING PROGRAM OF 1 MILLION+ CONCLUDED THAT:

- 1** Donors who received a letter directly asking them for a bequest were **17 times more likely to give a bequest than donors who were not asked.**
- 2** Donors who were asked and thanked **gave twice as much as those who were not thanked.**
- 3** Those who were cultivated (notes, letters, visits, etc.) after the thank-you **gave 3 to 4 times as much.**
- 4** **Fewer than 1 donor in 14 had informed the charity** that they had named them as a beneficiary in their will.





**70% OF DONORS WHO MADE  
PLANNED GIFTS DID SO  
BECAUSE THEY WERE ASKED.**

**ASK, AND YE SHALL RECEIVE.  
YE HAVE NOT,  
BECAUSE  
YE ASK NOT.**

# smart**giftmaker** solutions

## STRATEGY + CREATIVE + TECHNOLOGY = RESULTS

We're a donor-centric strategic marketing firm with digital innovation at our core. We understand that 80% of an organization's revenue comes from less than 20% of its donors or clients, so we fish where the big fish are. Our unique, trail-blazing technologies and marketing services help you raise more money from the crucial 20%, efficiently—delivering unparalleled results. Get more major gifts for today and more planned gifts for tomorrow.

### legacy**giftmaker**

Generate more leads, cultivate more donors and find more legacy gifts. Individual tracking reports show who is interested in your organization and why, so you can engage and build effective relationships with potential donors.

### legacy**giftmaker+**

Take the guesswork out of marketing by using proven technology to rank, score, and automatically nurture leads with relevant, timely, personalized messages. You'll maximize your gift disclosures by spending your time with the most qualified and interested donor prospects, and letting Legacy Giftmaker+ take care of the rest.

### major**giftmaker**

Find passionate donors in real time, and close more major gifts – faster. Major Giftmaker gives you a 360° view of individual donors' interests, demographics, and preferences.

### giftmaker**connect**

Donors want to give where they live. With Giftmaker Connect, you can tap into the power of smarter fundraising by connecting the disconnected and empowering your chapters or affiliates.



We do the marketing. You get the results.

[www.imarketsmart.com](http://www.imarketsmart.com)