

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

www.imarketsmart.com

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!

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GREG WARNER
CEO, MARKETSMART

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

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

ENJOY THE REPORT!



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

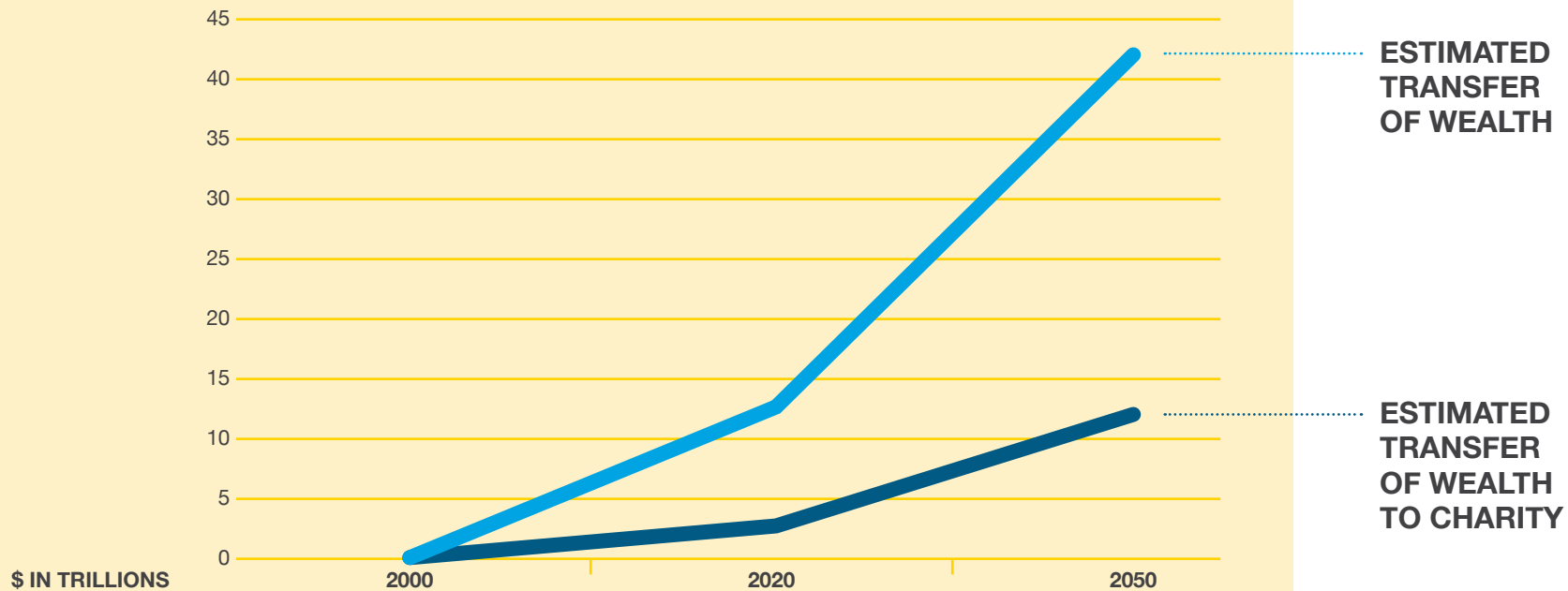
\$41 TRILLION
IS EXPECTED TO TRANSFER
EVEN IN LIGHT OF
CURRENT ECONOMIC
CONDITIONS.



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	\$24.8
<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,

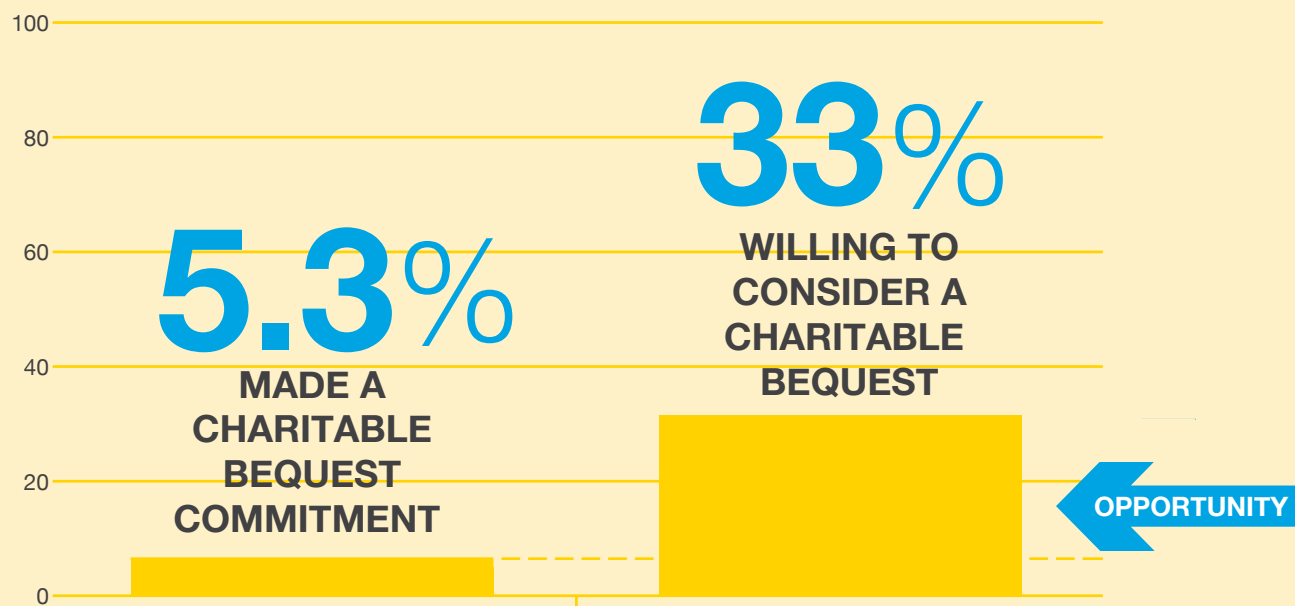
IT’S TIME TO THINK AGAIN.

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 8%

of charitable giving came from bequests in 2014, but the total came to

\$28.13 BILLION

Prior to that ONLY 1,264

bequests over \$1 million were received between 2000-2011, but the total came to

\$39 BILLION

PEOPLE GIVE WHERE THEY LIVE

Compared with other types of million dollar donations, charitable bequests of \$1 million plus were more likely to go to **local nonprofit organizations.**

For instance, for higher education institutions, 61% of the number and 75% of the dollar value of charitable bequests remained in the same state.

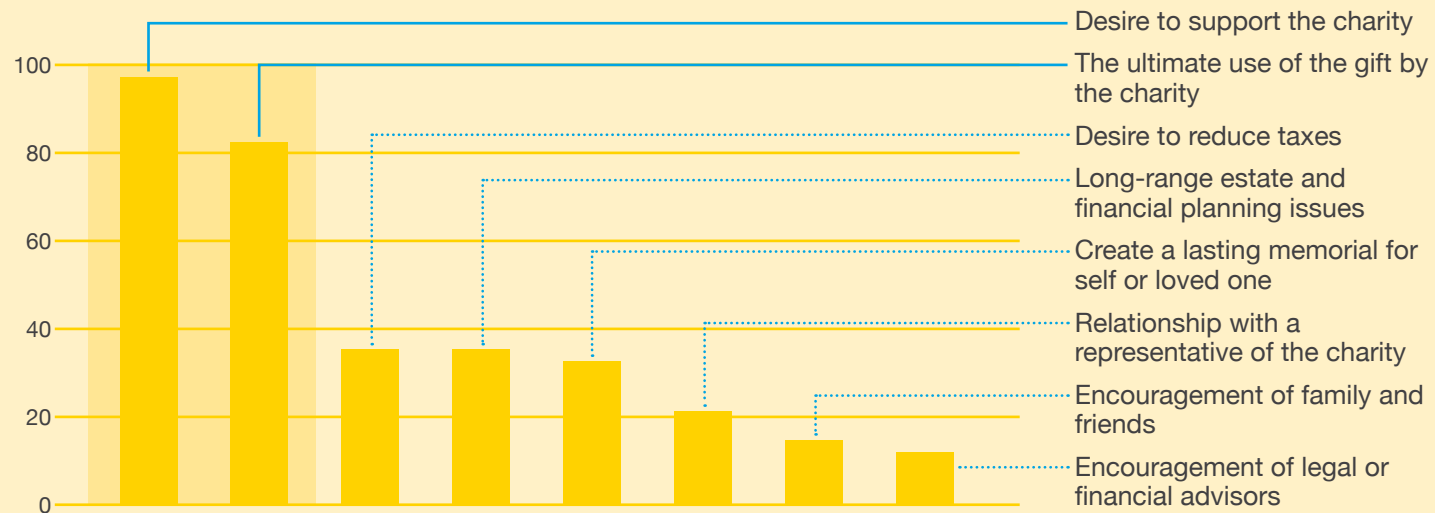
And, 75% of the number and 80% of the dollar value of charitable bequests remained in the same geographic region.



TOP REASONS DONORS MAKE PLANNED GIFTS:

97% DESIRE TO SUPPORT THE CHARITY

82% THE ULTIMATE USE OF THE GIFT BY THE CHARITY

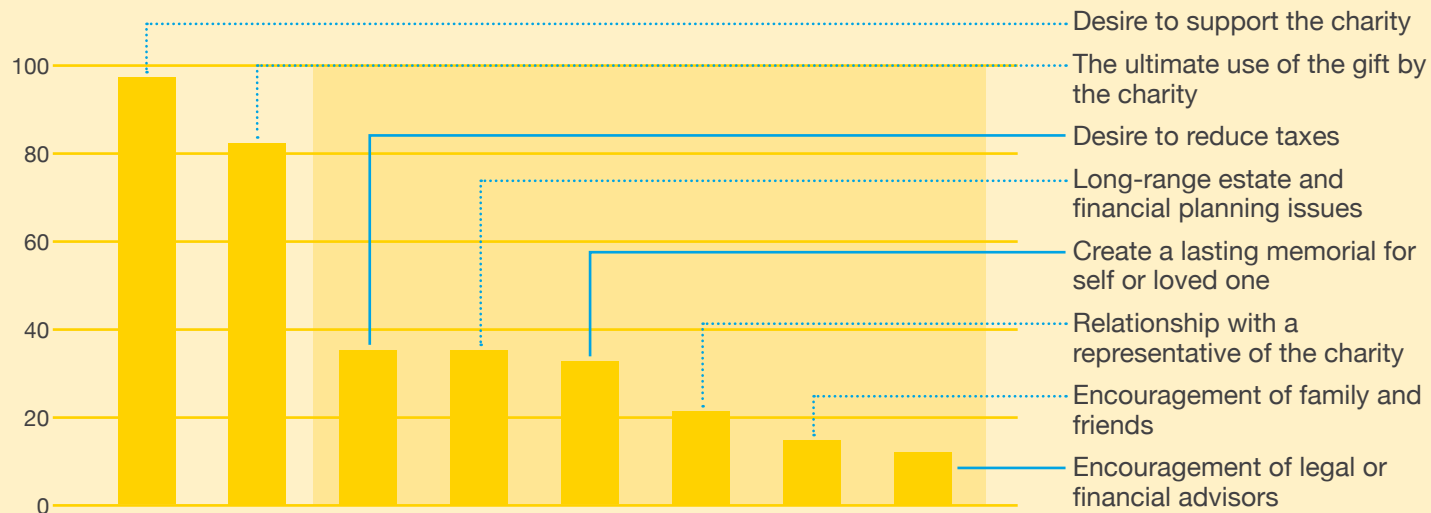


TOP REASONS DONORS MAKE PLANNED GIFTS:

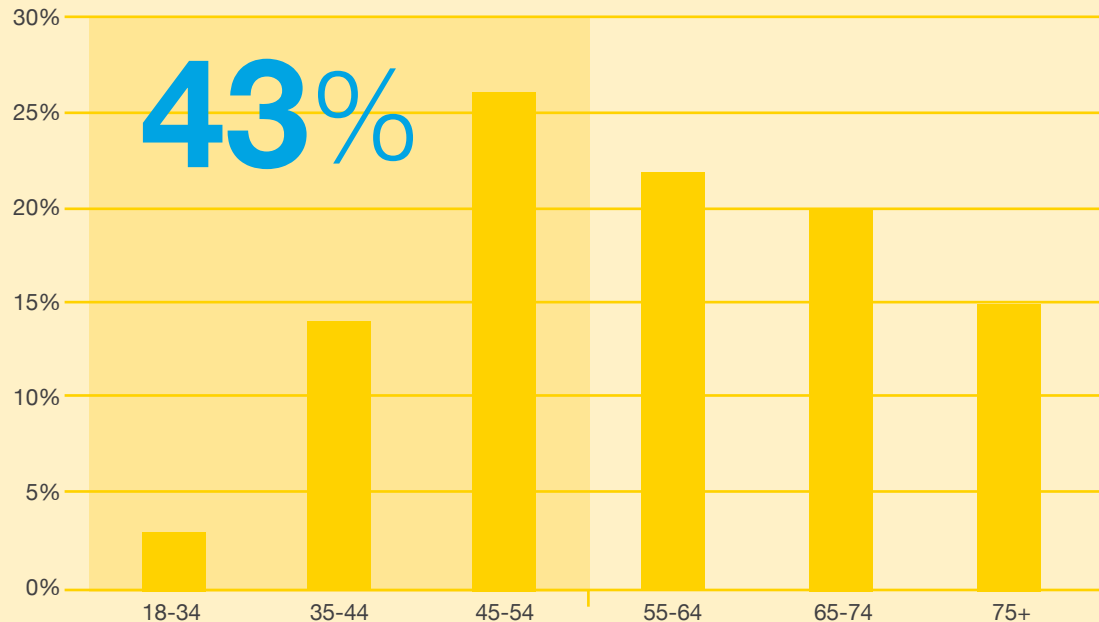
35% DESIRE TO REDUCE TAXES

33% CREATE A LASTING MEMORIAL FOR SELF OR LOVED ONE

12% ENCOURAGEMENT OF LEGAL OR FINANCIAL ADVISORS

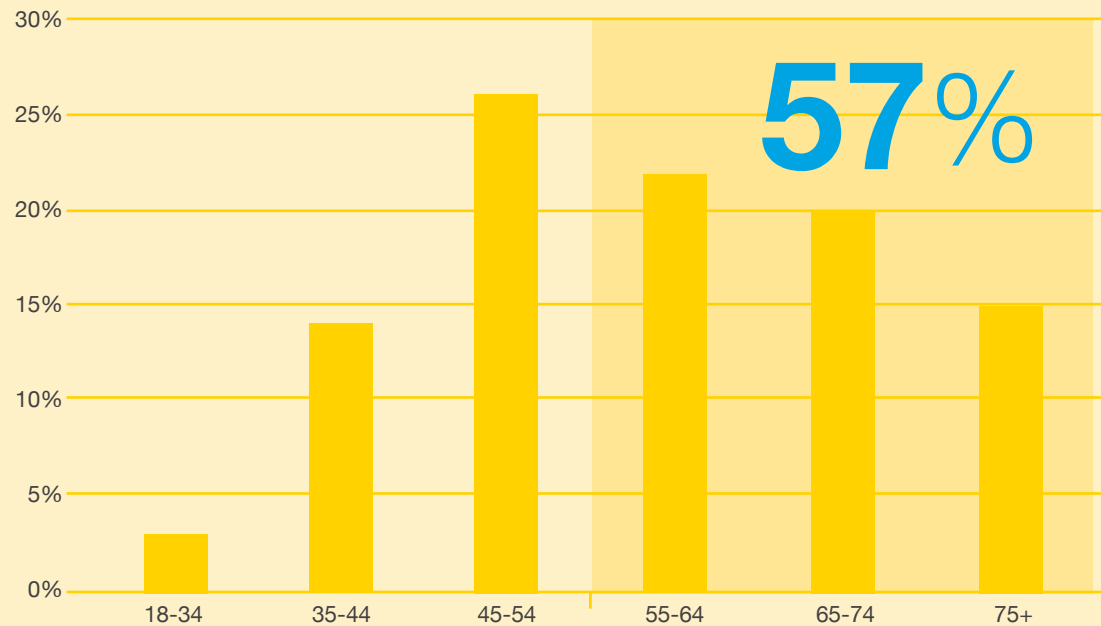


43% OF INDIVIDUALS SETTING UP GIFTS TO CHARITY IN THEIR WILLS WERE FOUND TO BE UNDER 55



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

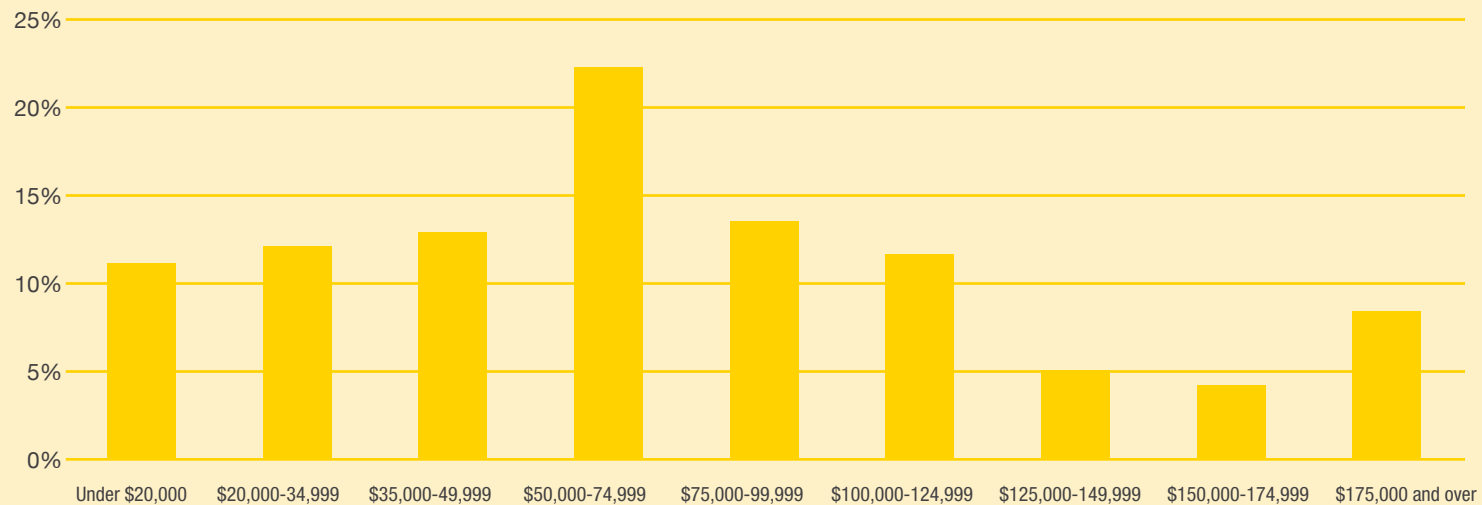


18.89%

OF RESPONDENTS TO OUR MARKETING
HAVE NO CHILDREN

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

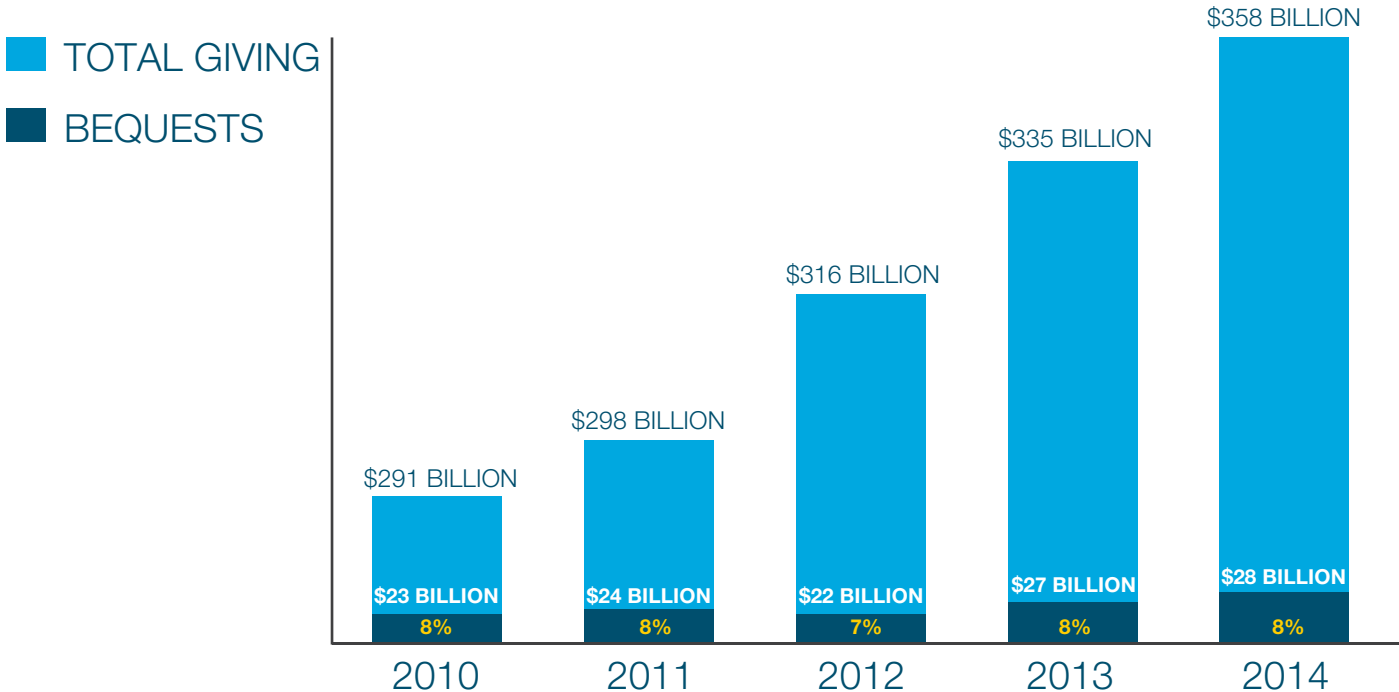
80-90%

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.



ON AVERAGE BEQUESTS ACCOUNT FOR 8% OF NONPROFIT REVENUE



YET MOST FUNDRAISING BUDGETS WOEFULLY UNDER-INVEST IN MARKETING PLANNED GIFTS

solutions

survey**giftmaker**[®]

Generate more major gifts and uncover previously undisclosed planned gifts with donor surveys.

major**giftmaker**[®]

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

giftmakerconnect[®]

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

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.

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 Giftmaker+ take care of the rest.

Our mission is simple
We help nonprofits raise more money, more efficiently

Click [here](#) to see what your peers are saying



We do the marketing. You get the results.

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