

**COPYWRITING
BASICS**
FOR YOUR
**LEGACY
GIVING
WEBSITE**

WWW.IMARKETSMART.COM



market **smart**

We do the marketing. You get the results.

WWW.IMARKETSMART.COM | 301.289.3670 | 1

You've decided to tap into the greatest transfer of wealth that the world has ever seen by building a LegacyGiving website. You're already ahead of hundreds of thousands of other organizations out there.

Take a moment, pat yourself on the back, and then let's get down to business.

**HERE'S HOW
TO WRITE YOUR
WEBSITE SO
YOU GET
A TON OF
LEGACY
GIFTS.**



THE PSYCHOLOGY OF PLANNED GIVING

When nonprofits ask for legacy gifts, two things happen*:

- 1 Avoidance.** The donor does not wish to think about their death.
- 2 Contemplation.** **The donor thinks about symbolic immortality: how they will be remembered, how they would like to be remembered, and about whether your organization's mission is aligned with their life and values.**

Additionally, neuroimaging of bequest donors shows that different parts of their brains are activated than when making regular philanthropic gifts.

In other words, **acquiring planned gifts is fundamentally different than acquiring normal gifts.** How you motivate planned gifts is different, and your entire site should be based on this research or you'll receive far fewer gifts than you could have otherwise.

* Russell James III, J.D., Ph. D., Texas Tech University

WHO IS THE WEBSITE FOR?

A legacy giving website is for the people who want to make a gift without involving you — and there are far more of them than you think.

80% of the people who make planned gifts are people of average means.* Most of them won't call your organization or ever disclose their gift. Their gifts will not involve complicated legal trusts.

Your planned giving website's job is to inspire donors to contemplate their symbolic immortality and give them what they need to designate their gift. That means the information necessary for them to educate themselves on the type of gifts available to them, and the tools to make bequests and update their wills.

You'll also want to feature prominent 'get in touch' and/or 'ask a question' buttons to give the people who do want your help a way to have their questions answered.

* National Committee on Planned Giving, Indianapolis, IN



YOUR BIGGEST HURDLE

As a rule, most of your donors avoid thinking about their death. As a consequence, **most of them will have a hard time getting started on their wills and making legacy gifts.**

Here's what that means for you as you write your legacy giving website:

- Keep your tone positive! Make it about legacy, impact and values, not death.
- You need to make it seem as easy as possible to make a planned gift.
- Suggest leaving a charitable bequest to honor a friend or family member.
- As you write your site, emphasize how easy it is for them to update or change their will. Tell stories of other donors who have given gifts and highlight how easy it was for those donors.
- Your main goal is to get your donors to act on at least one call-to-action; download an information packet, or sample bequest language, or even a planning checklist.

Then they are on the path to making a gift — but you'll need to lead them along the path. Set up regular reminders with cultivation marketing to drive them back to your site — with a call-to-action each time — and hopefully they'll ultimately leave your organization a gift.

ANSWER

THE QUESTIONS YOUR DONORS ARE ASKING

Most nonprofits simply post information about their planned giving process on the web. It's mostly about the organization itself, and about the legal and tax minutia that tend to overwhelm and confuse potential donors.

Instead, put yourself in your donor's shoes. What are they thinking about? What questions are they asking?

If your planned giving website answers questions that only *you* and *your staff* are asking, you're in for disappointing results.

But if you help donors answer the questions *they* are asking, then you're in for record-setting revenue. Here's how to get there . . .



HOW TO GET TO THE TIPPING POINT

Donors are at your legacy giving site because they are interested in learning more about planning their estate — and may be interested in leaving a planned gift. **So what's going to take them from interested in planning their estate to including your organization as a beneficiary?**

The following messages are proven to ease the fears of potential planned givers and move them towards making gifts:

- Show them that their gift to your organization will be a very wise investment
- Emphasize the success of your organization — donors want to contribute to an organization that's progressing towards fulfilling it's mission. They want to back a winner!
- Show how their gift makes a real difference to other people and to the community
- Share stories of living donors that decided to leave a legacy gift.
- Show them why it's wise to have a plan (but don't try to scare them into making one — they'll walk away)
- Share the tax benefits of some kinds of gifts (though this is the least important element on this list)

WHAT'S THEIR MOTIVATION?

Work the following ideas into your website copy. **These are the primary emotional motivators of people who leave planned gifts:**

- Leaving a legacy
- Helping others
- Supporting their community
- Be remembered favorably
- Making a difference
- Inspiring others
- Making their family proud
- Honoring a family member or friend

The list of emotional motivators above is more powerful, but the following practical reasons can also be included:

- So they can receive annual fixed income
- Security
- Benefit from deductions to current taxes
- Getting better rates and better returns
- Benefitting others while helping themselves
- Reducing gift estate taxes



BE DONOR- CENTRIC

As strange as it sounds, your website should not be about your organization. Your site should be about your donor, their legacy, and their gift.

Of course you'll talk about your organization, its mission, its legacy and its impact. **But if you make your site donor-centric by answering their questions and giving them the tools they need, you'll quickly have a successful program.**

As much as possible, focus your copy on how the donor will benefit by making a planned gift. For example, use the headline "Income For the Rest of Your Life" instead of "Charitable Gift Annuity".

LET THEM CHOOSE

Make it clear that the donor can designate their gift. This makes it clear to the donor that the gift is about them, their values, and their legacy.

When you provide sample bequest language, include copy that says something similar to, "...for the restricted purpose of _____."

They are writing their legacy with their gift. Let them write it however they'd like (within reason).

The most fruitful thing you can do is to **suggest that the donor contact your organization** to work out the details of a restricted bequest. That way a gift officer can work through the details with them, and you'll have the **added benefit of "discovering" many gifts** that you might otherwise not know about.



BONUS

DESIGNING FOR LEGACY GIFTS

What's the #1 design principal when building websites for legacy giving?

Make sure your users can read the site. They'll be older than the average web user and you need to design accordingly.

Follow these guidelines and you'll build a readable, usable site:

- Use a font that's optimized for the web
- Size your font larger than you normally would and, if possible, allow users to control the size of the font
- Be very careful using reverse type (light text on a dark background) — it's one of the hardest things for older donors to read
- Make your calls-to-action stand out with high-contrast colors

ABOUT MARKETSMART

[MarketSmart](#) is a revolutionary marketing software and services firm that helps fundraisers **raise more money more efficiently and be the best they can be.**

Customers include hundreds of large and mid-sized nonprofits around the world including the Smithsonian, Food for the Poor, City of Hope Cancer Research Center, The Navy-Marine Corps Relief Society, Human Rights Campaign, The San Francisco Opera, Ocean Conservancy, The United States Holocaust Museum, many colleges and universities along with other leading organizations in every sector.

MarketSmart's unique suite of solutions **help fundraisers zero-in on the donors most likely and ready to make mid-level, major or legacy gifts.** These game-changing Internet tracking technologies score each prospect's level of engagement online in order to help fundraisers prioritize who should be contacted most urgently. Additionally, our other products include:

- The [Fundraising Report Card](#) which helps nonprofits visualize their metrics while providing valuable benchmarks by sector (free for organizations with 5,000 or fewer donors);
- And the [DAFwidget](#) (BETA) which helps nonprofits generate more revenue from donor advised funds at no cost (free for all nonprofits).

Organizations implementing MarketSmart's systems and strategies have been able to revamp their approaches to mid-level, major gift and legacy gift marketing to **raise millions of dollars.**

