



Don't Simplify. Over-Simplify.
And Keep It Strategic.

Viken Mikaelian, CEO



Planned giving is a
people business.

**If you love people, you'll
raise more money than
you've ever imagined.**



How To Win Friends And Influence People.

Dale Carnegie, Published 1936

Electronic versions available online for \$1.76

Your Competition:

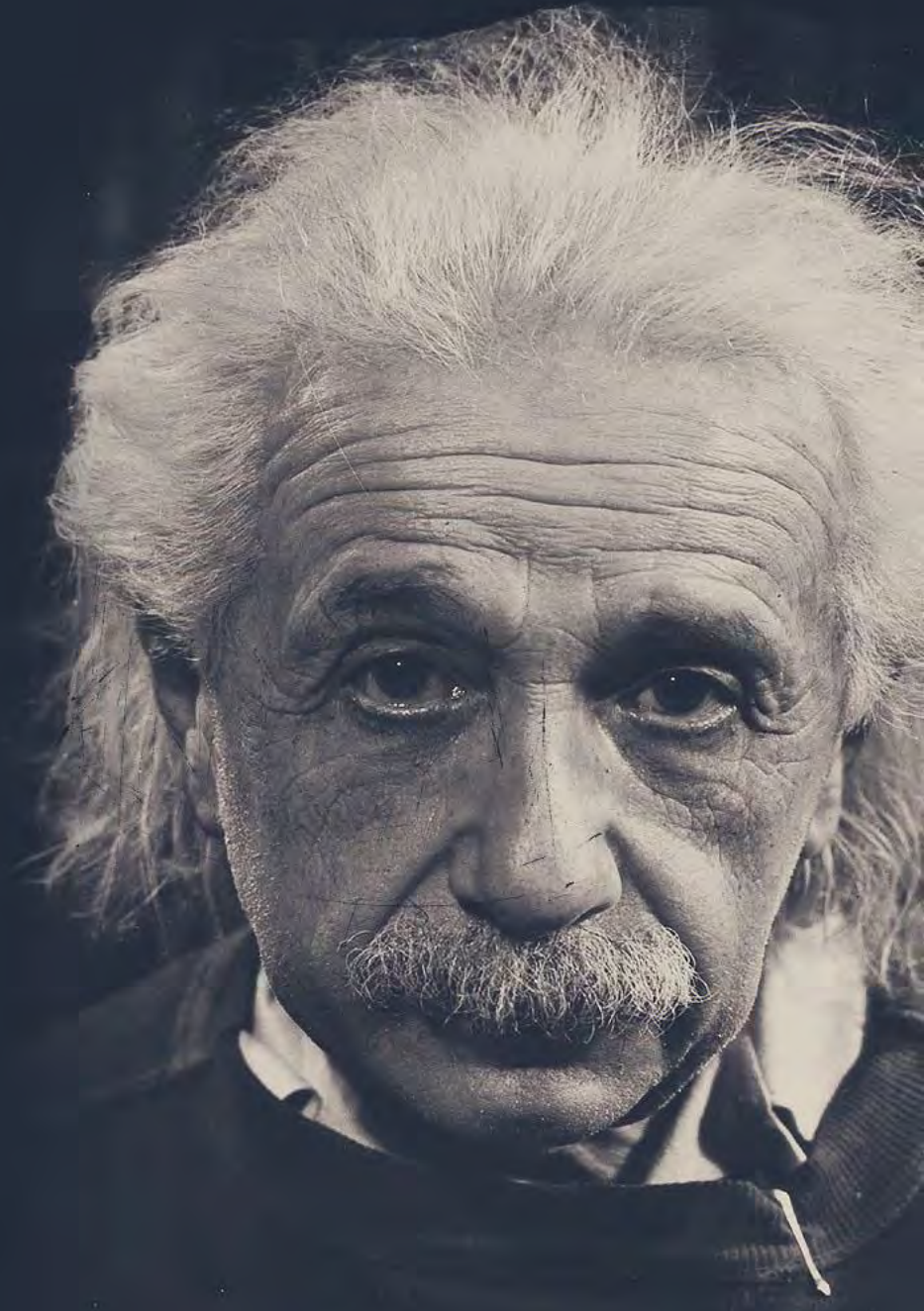
{ Distractions }

Get to know your donor.

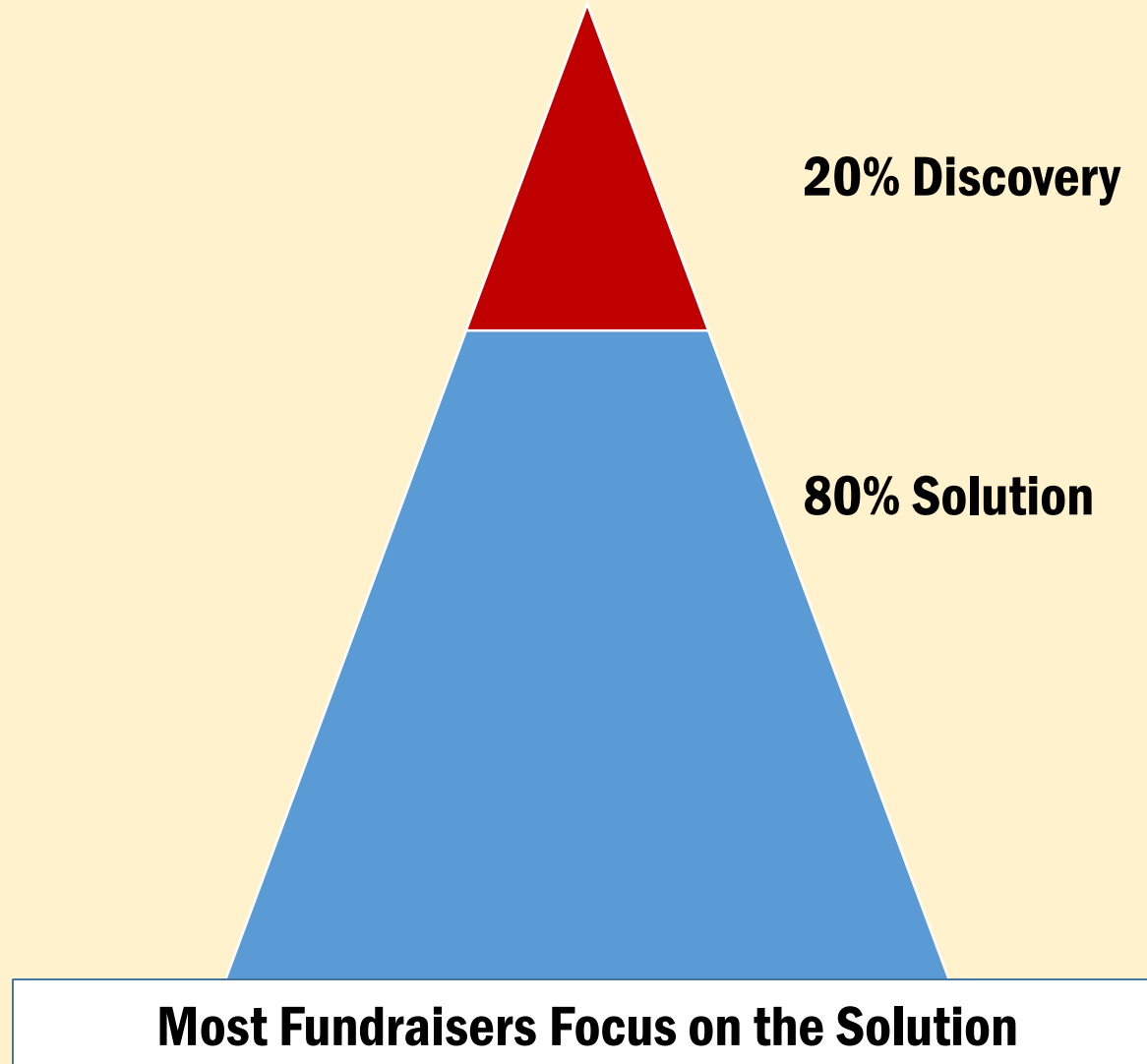
It's like dating. Long-term dating.

If I had one hour to
save the world, I would
spend 55 minutes
defining the problem
and only five minutes
finding the solution.

Albert Einstein



The Wrong Way to Get to Know Your Donor



The Right Way



Focus on Getting to Know Your Donor

80% Discovery

20% Solution

Are you asking these
questions?

(If not, you should not be in fundraising.)

Do they have children?

Grandchildren?

Special nieces/nephews?

What are their hobbies?

What's a fun memorable
moment in their life?

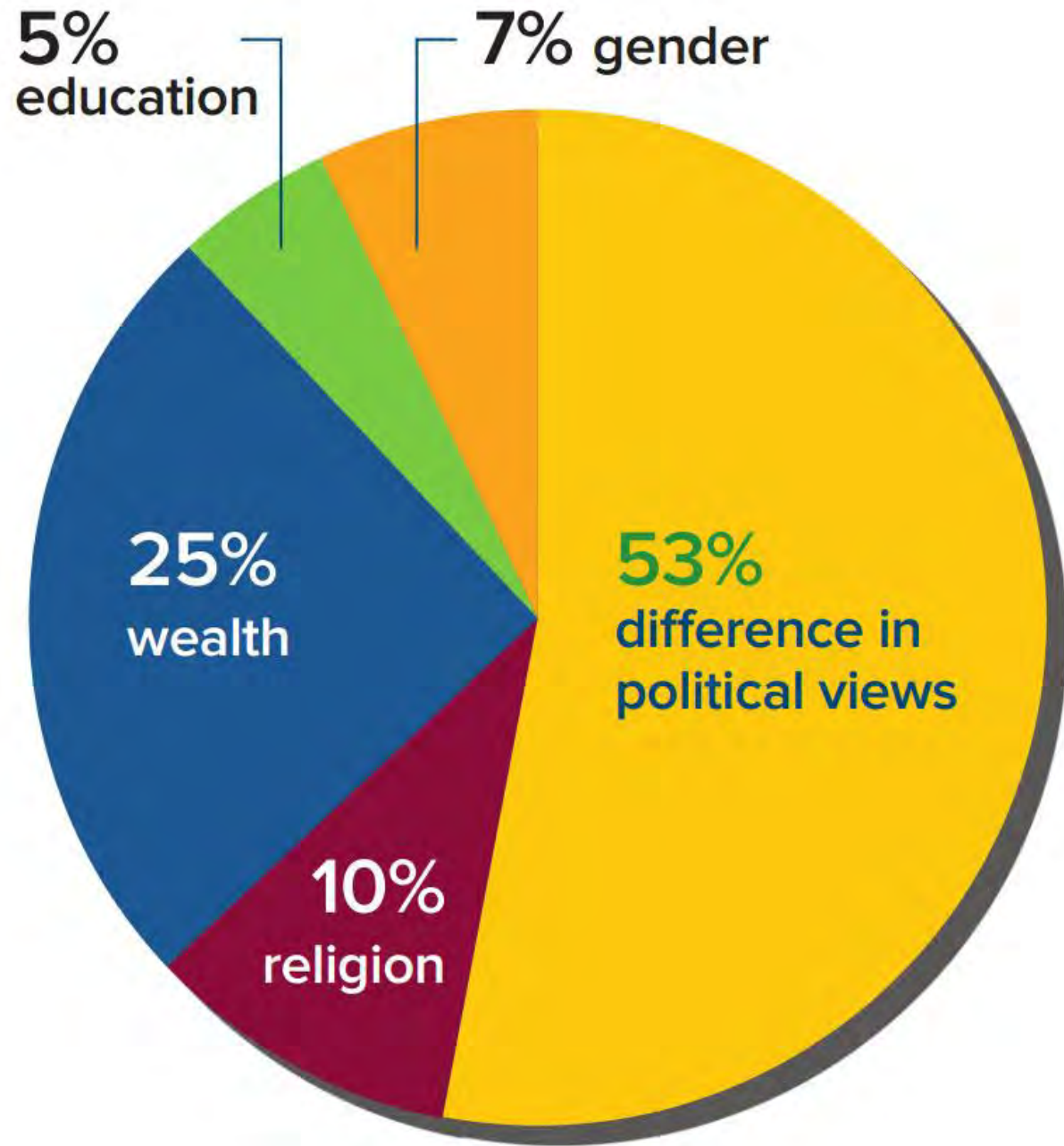
What's an embarrassing
moment in their life?

What are some of the most significant events in their life?

What was their first job?

Favorite job?

Favorite professor?



Do not bring up the following (exceptions apply)

POLITICS

RELIGION

MONEY

Stop telling the prospect we can't wait for him to die.

Benefits vs. Features

*Please leave us
in your will.*



**Bequest,
Bestow,
Bequeeeeth?**

(Don't Make Your Prospect Think)

**The day I listen to the Hospital
about how to restructure our
portfolio, I'll send our broker
there to perform bypass surgery.**

**We need the funds now to
maintain our property today.**

**Your donor hears:
Give us some bucks now to
take us out of our misery.**

**We're working on supporting
our future, so we can continue doing
what we do today, even better,
for generations to come.**

It's all about planting the seeds now for future generations.





The 25 Estate Documents You Need to Put in One Place

plannedgiving.com/resources

{ Elevator
Pitches }

Make a gift that costs nothing
during your lifetime.

Make a gift and receive
guaranteed income for life.

Did you know giving stock can be more beneficial to you, and us, than giving cash?

{ Marketing }
{ Messaging }



The Johnstons helped Westin Memorial and benefitted themselves, too. Because they made their gift through a Retained Life Estate, they can continue living in their house for as long as they wish! They also receive a charitable tax deduction, avoid potential capital gains tax, and can exclude the property from their taxable estate.

GOT REAL ESTATE?

- ✓ If you own a home or vacation home that other family members don't want...
- ✓ If you own property that is burden to manage...
- ✓ If you own property you don't need any more...
- ✓ If you are likely to owe significant taxes if you sell a property...

You can do the same good deed as the Johnstons, and Westin can help. Donating real estate brings you peace of mind as well as the satisfaction of creating a lasting legacy that supports a mission you believe in, while taking advantage of potential financial and other benefits for yourself or someone you love.

Please contact me personally to learn more about Retained Life Estates and other appealing ways to make a gift of real estate to Westin Memorial.

MIKE MILLER, 123-456-7890 | MIKE@WESTINMEMORIAL.COM



Westin Memorial Health System

**Don't worry.
You don't need a will.
The government will
take care of it for you.**

Really.



**Westin Memorial
Children's Hospital**





**You Always Get a Check-up.
Why Not Your Will?**

*Especially for those you
really care about.*

**Bring
Something
Special
to the World**

Make a gift through your estate that costs nothing during your lifetime.



**Bring
Something
Special
to the World**

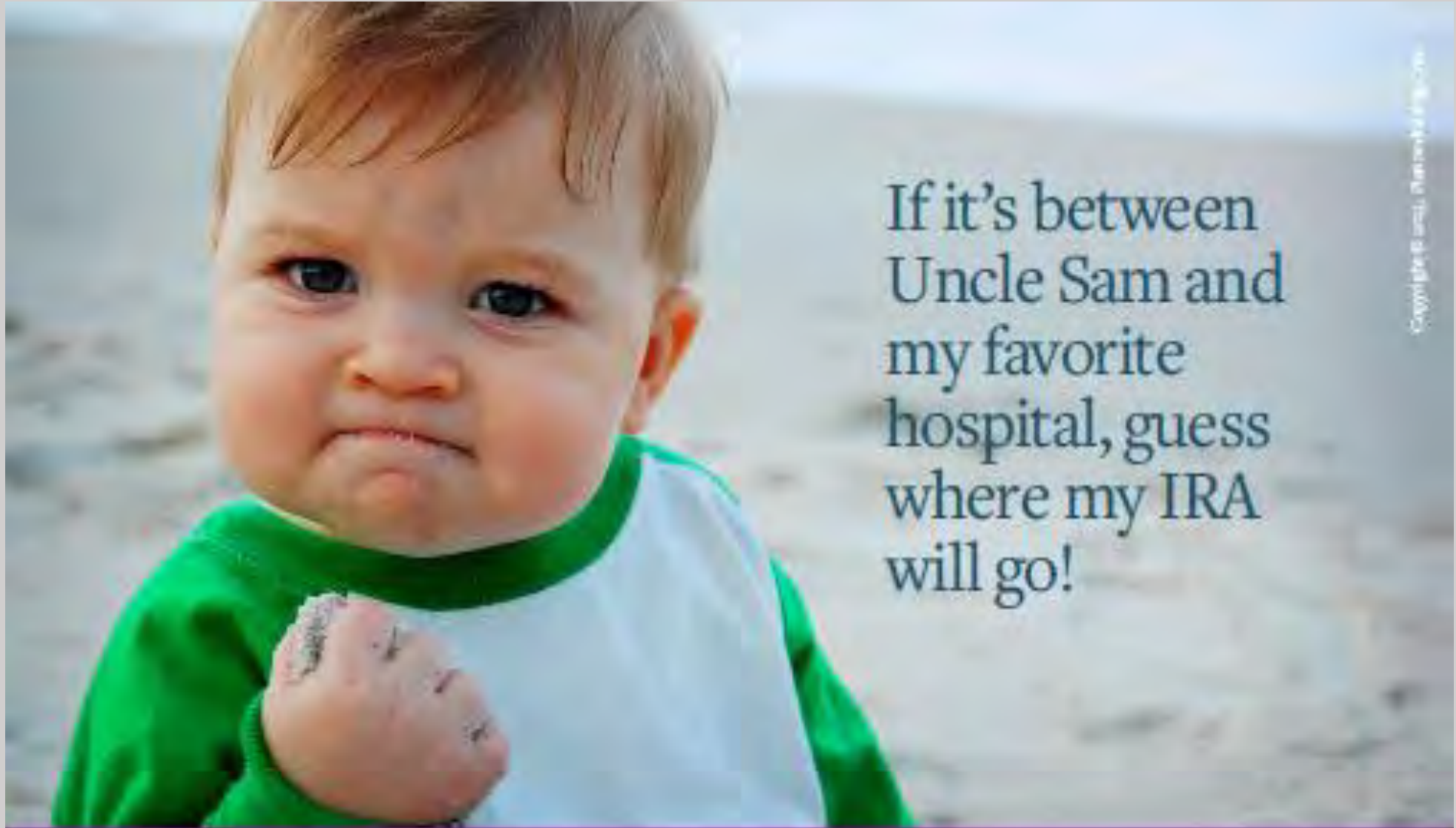
**Make a gift that costs nothing
during your lifetime.**





“I’m too young
to make a gift.
I’m saving for
retirement.”*

* We have a gift plan that
helps you do both. It’s called
a Deferred Gift Annuity!



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If it's between
Uncle Sam and
my favorite
hospital, guess
where my IRA
will go!

Did you know your IRA can be taxed up to 70% if passed to heirs?
Here's how to avoid it.

everybody's talking

*Donating stock to our shelter
can be more beneficial
than giving cash!*



*It's okay to be
selfish when you give.*

Did you know you can
make a gift and receive
guaranteed income
for life?

It's called a Charitable
Gift Annuity.

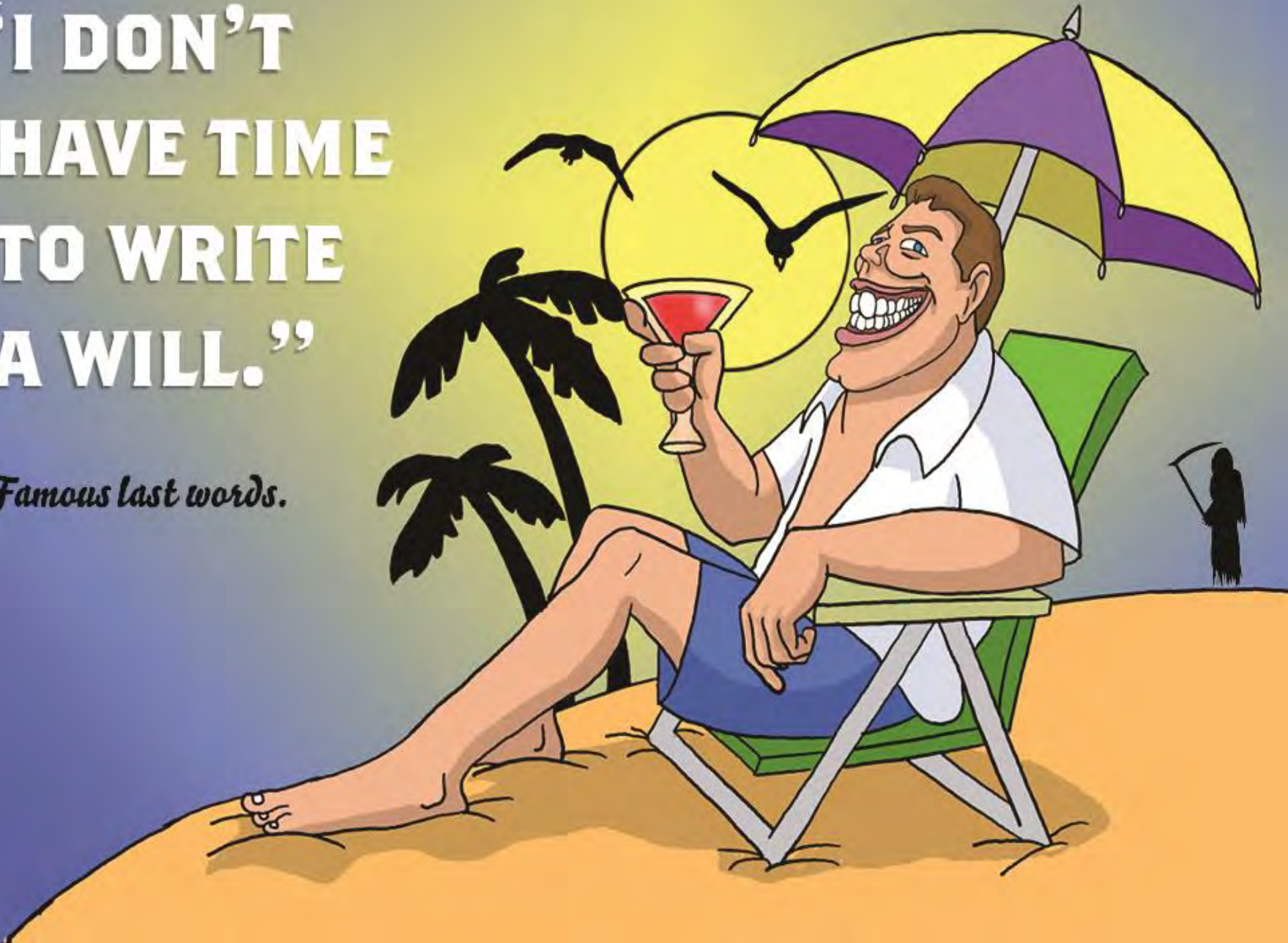




"I CAN SAVE YOU MONEY, OR I CAN COST YOU MONEY. ANY PREFERENCE?"

**“I DON’T
HAVE TIME
TO WRITE
A WILL.”**

Famous last words.





“I want the
children to
remember me.”

It's easy.

You can make a simple, yet
transformational gift through
your will or estate that **costs**
you nothing during lifetime.

Leave your mark.

Share life with others by
leaving your legacy.



PENNSTATE



Penn State Alumni Association
Hintz Family Alumni Center
University Park, PA 16802



I remember my days at Penn State
when I used to chase Molly around at
The Corner Room until we got married...

Now that Molly is gone ...

PENNSTATE



Penn State Alumni Association
Hintz Family Alumni Center
University Park, PA 16802



Since I joined the Penn State team in 1973, I have never missed a game. **Not one.**

Mr. John Lambertson
Director of Development
4567 Narberth Drive
Unit 26
Villanova, PA 19085



*The good news is we have enough money
to build our new building.*

The bad news is it's still in your pockets.

The good news! We have enough money for our new clinic.


THE BAD NEWS: IT'S STILL IN YOUR POCKETS.



**Westin Memorial
Children's Hospital**



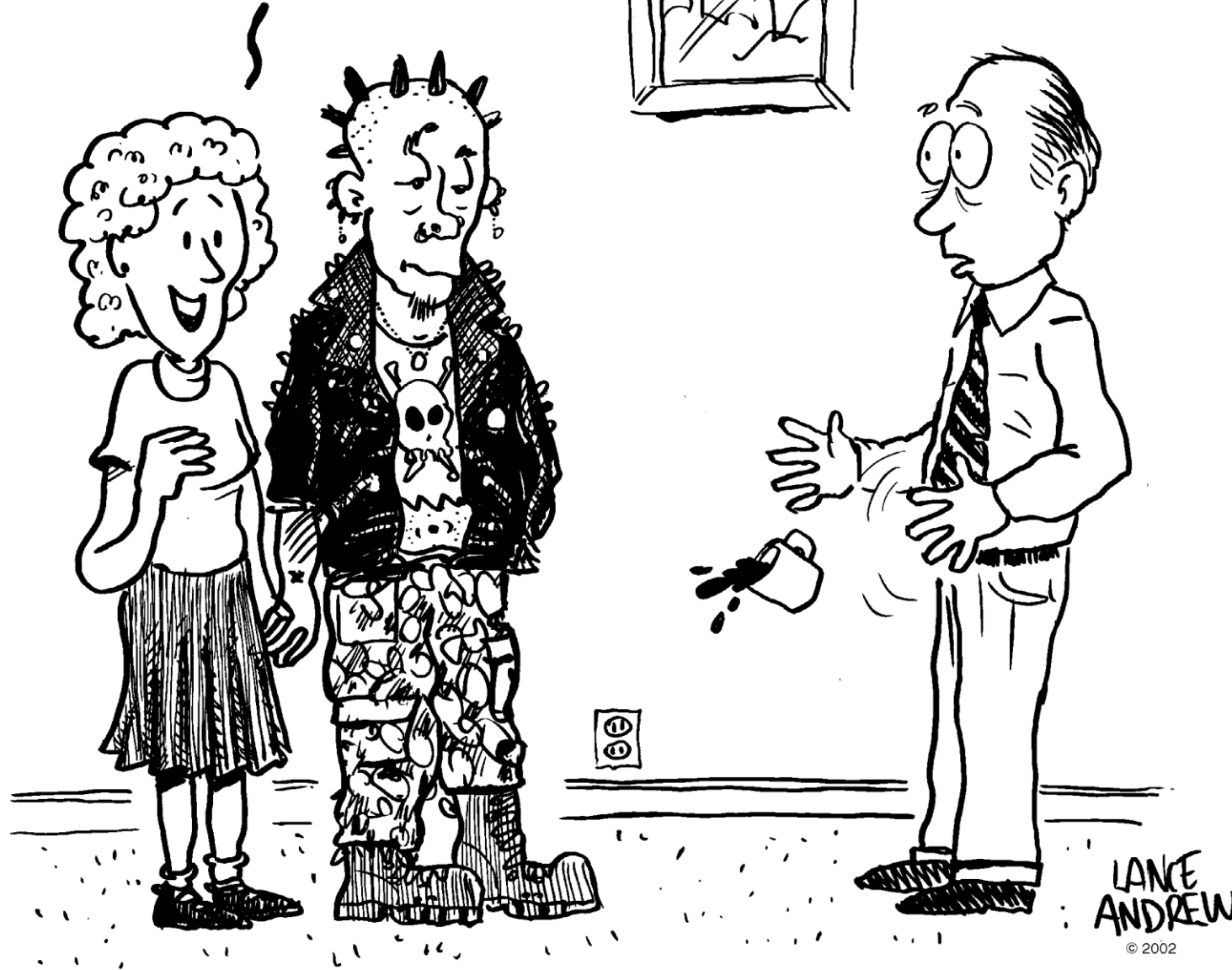
5000 Children's Place, Anytown, USA 12345 • (123) 456-7890

A man with a mustache and curly hair, wearing a green checkered blazer over a red patterned shirt and red trousers, is striking a confident, slightly off-kilter pose. He is pointing his right index finger upwards. The background is plain white.

BE THE RICH ECCENTRIC RELATIVE

YOU WISH YOU HAD.

GUESS WHAT, DAD!
-SPIKE AND I ARE
GETTING MARRIED!



**Having a
Bad “Heir”
Day?**

**Reason #27
for updating
your will.**



SAVE THE DATE • SAVE THE DATE • SAVE THE DATE
June, 22
2013



"Patty, girls don't become pilots!"



—PATTY WAGSTAFF
Three-time U.S. National
Acrobatic Champion, whose Extra
300 aircraft is in the National Air
and Space Museum next to Amelia
Earhart's Lockheed Vega.

Oh, yes they do. And Patty Wagstaff became the best — among men and women. Today, she's a champion acrobatic pilot, air show star, acrobatic coach and trainer, writer and lecturer.

She's also a member of the Smithsonian Legacy Society, as one of many benefactors who has included the National Air and Space Museum in their will.

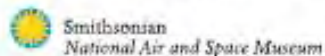
Find out how you can include the National Air and Space Museum in your estate plans. Fill out and return the reply form below, or call 202-357-2403. You may also e-mail gayle.union@nasm.si.edu. Help us reach our fullest potential!

"The Museum promises so much potential, to inspire kids, stretch imaginations, and preserve the amazing history of flight. My bequest will help keep the promise. You can help, too."

Potential

**Please Give to the Smithsonian's
National Air and Space Museum**

- YES!** Please send me information on how to include the National Air and Space Museum in my will or living trust.
- I have already included the National Air and Space Museum in my estate plans.



Name _____

Address _____

City _____ State _____ Zip _____

Daytime Phone Number _____

E-mail _____

All replies are confidential. Mail to: Gayle S. Union, National Air and Space Museum, Suite 3743, Independence Avenue at Sixth Street, SW, Washington, DC 20560-0321, Phone: 202-357-2403, E-mail: gayle.union@nasm.si.edu RJ 05-02



“Henry, you’re doomed to fail. You’ll be milking cows all your life!”

Today, Henry is still milking cows. In fact, he owns one of the largest dairy farms in Pennsylvania.

“I believe in sharing. And when the college contacted me about making a gift that costs nothing during my lifetime, I decided to leave DelVal in my will. I can now help DelVal provide other young people with the opportunity to experience the ‘learning and labor’.”

For more information, please contact:

Thomas Smith
215-555-5555
t.smith@delval.edu



Tom and Mary Huntinzer

Final Thoughts on eMail Marketing

US Mail beats eMail, and research shows.

But don't follow research.

Follow common sense...

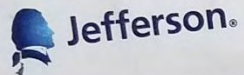
as the next two slides say it all.

10 YEARS AGO



NOW





Office of Institutional Advancement
125 S. 9th Street, Suite 600
Philadelphia, PA 19107

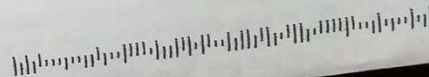
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Diran Mikaelian, MD
160 Wrenfield Way
Harleysville, PA 19438-2857

19438-285760



Final Thoughts

- You need to be strategic (not tactical) and deliberate about managing your donor relationships.
- Shift your focus to the donor, not the \$\$\$.
- Direct your efforts on “discovery” not the “solution”
- You don’t need to be a “PG Expert” to initiate the PG conversations with your donors.
- Your donors do not understand the PG jargon.
- Donors making gifts through their wills typically increase their annual support – they have a vested interest in seeing the organization succeed.

Remember... planned giving is a people business.

Resources

- IQ Test: www.PGIQ.com
- PG Readiness Calculator: www.AreYouReadyForPlannedGiving.com
- Corporate Site: www.PlannedGiving.com
- Weekly Tips: www.plannedgiving.tips
- [Planned Giving Tomorrow](#)

800-490-7090



Remember... planned giving is a people business.