

Major Gifts and Planned Gifts



The donor is in relationship
with the mission.



Going to Disney World

VS

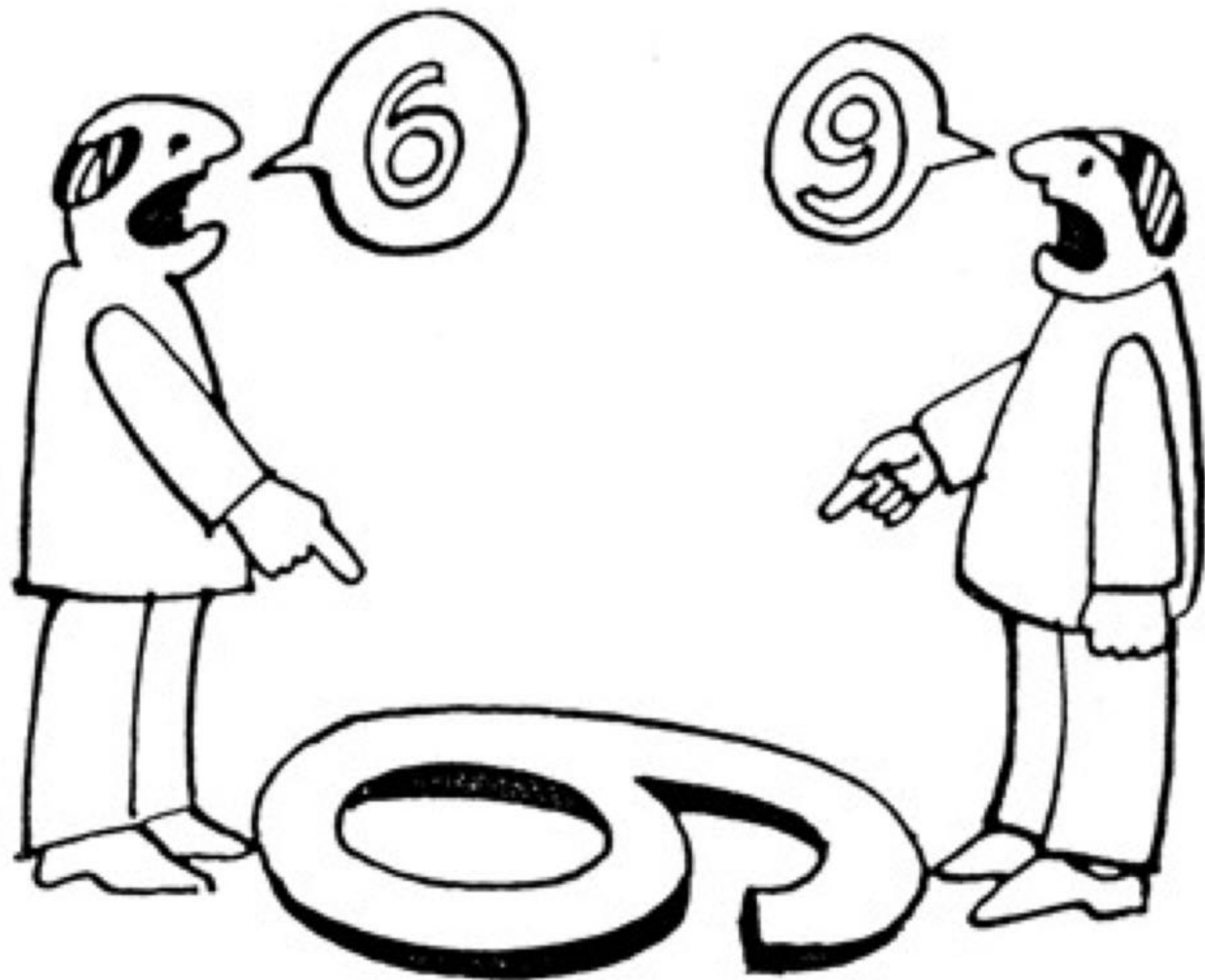
Buying Stock in Disney

Major: Serious and Significant

Planned: Arrange in advance

All major gifts are planned.

All planned gifts are major.



5 "Gotta Know Its" for Major / Planned Gifts

#1 Elephant in the Room

#2 Top 25

#3 Know Your Revenue Model (and its influence)

#4 Don't Ask For Help

#5 Ditch the (elevator) Pitch



1

Self-Awareness

Understand Your Money "Stuff"

**What values are you
attaching to money?**

**Power. Greed.
Privilege. Authority.**

**Justice. Influence.
Courage. Love.**



Know Thyself



**What happens
when you put
money at the
center of a
relationship?**



**Center relationships
around
the Mission,
the Work,
the Shared Values**

**Philanthropy is evidence that
someone's values are alive
and manifested in the world.**

With a New Introduction

Foreword by Jack Canfield, author of *Chicken Soup for the Soul*

The Soul of Money

Transforming Your Relationship
with Money and Life

Lynne Twist

"A life-changing read. With warmth, honesty, and storytelling, Lynne turns everything we think we know about money upside down. ... It's the book we all need right now."

—ERENE BROWN, Ph.D., author of the #1 *New York Times* bestseller *Living Strong*

JACOB NEEDLEMAN

"Jacob Needleman's story of his own search for a true middle ground between matters of the wallet and spirit is challenging, poignant, and important."

—*San Francisco Chronicle*

MONEY

AND THE

MEANING

OF

LIFE

INCLUDING AN ALL-NEW
USER'S GUIDE

THE INTERNATIONAL BESTSELLER

The Psychology of Money



TIMELESS LESSONS ON WEALTH, GREED,
AND HAPPINESS

MORGAN HOUSEL

"One of the best and most original finance books in years."

—JASON ZWEIG

Wall Street Journal

Hb

2

Know Your Top 25.

3

Know your
revenue model.

Understand its influence
on your organization.

49% EARNED
Private Fees for Services



31.8% EARNED
Government
Grants/Contracts



8.7% DONATED
Individuals



2.9% DONATED
Foundations



1.5% DONATED
Bequests



.9% DONATED
Corporations



5.2% Other



4

Don't Ask for



"Please help us to ..."

**"You have the ability to influence / change /
impact ..."**

It's not a "cry for help," it's an invitation to action.



5 Ditch the (elevator) pitch.

Questions To Ask:

When did you know you cared about this work?

Who modeled philanthropy for you?

What does "success" look like to you for our work?

What other causes do you care about?

What do you wish you knew about our work?

Would you be willing to share your story of giving with our staff /
board?

Questions To Ask:

Is your family aware of your philanthropic priorities?

How do you like to be thanked / communicated with?

Does our work feel "urgent" to you?

Do you prefer the "data" we share about our work or the personal stories?

**PEOPLE REMEMBER 75% OF WHAT THEY SAY
AND ONLY 25% OF WHAT YOU SAY**

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How do I engage my board?

Better Board Meetings.

Congratulations on not slipping into a coma during that boring meeting.

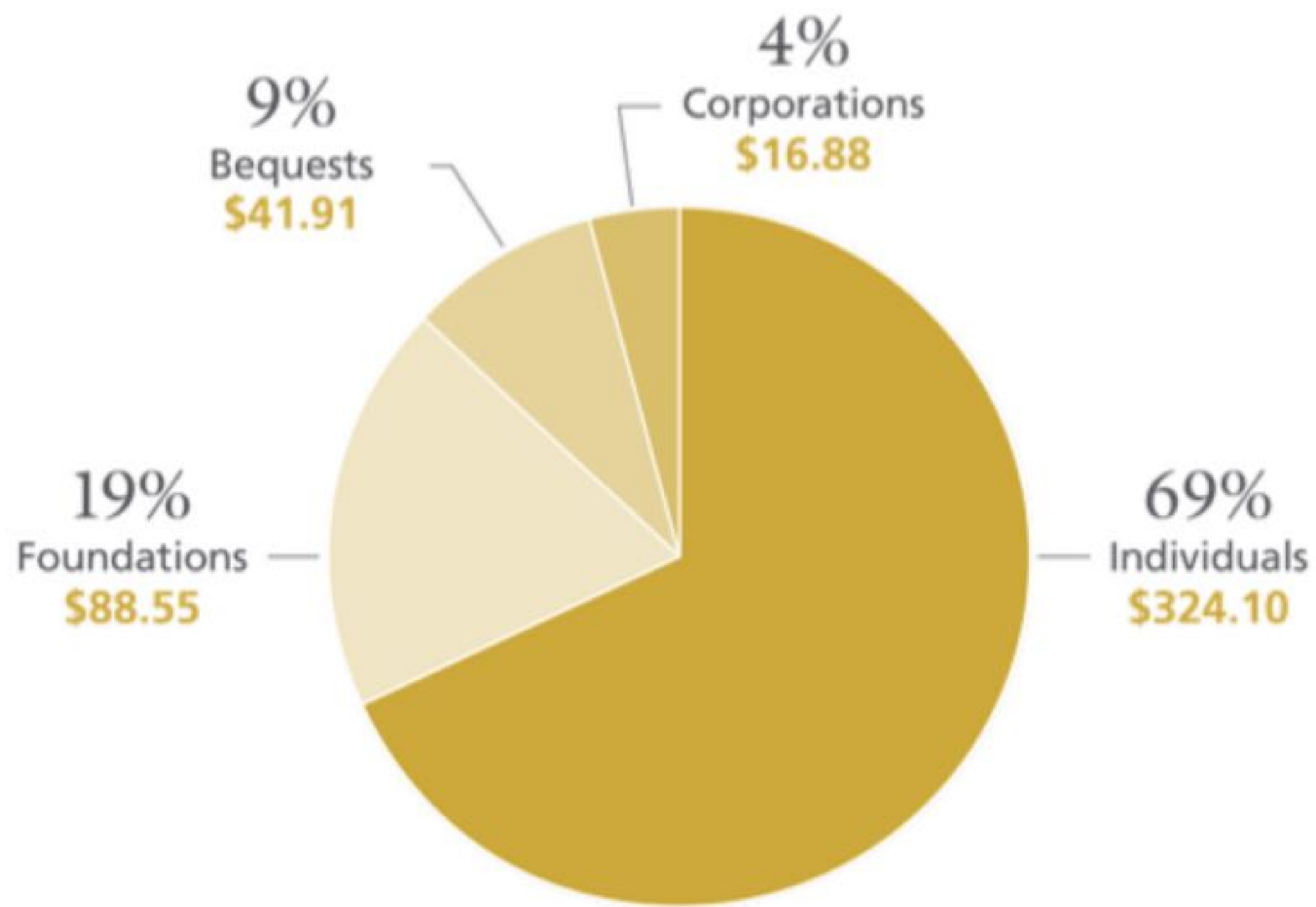




**Spotlight
on
Planned
Giving**

2020 contributions: \$471.44 billion by source of contributions

(in billions of dollars - all figures are rounded)



U.S. households are expected to transfer
close to **\$70 trillion** to their heirs and
charities by 2042.

**That's \$9.6 Billion A Day
Every Day
For 20 Years**

What can you buy for \$1 billion dollars?

Buckingham Palace is valued at
\$2.9 billion

Atlanta Braves are valued at
\$1.875 billion

Private Island in the Bahamas
\$75 million



Getting Started

Clean Database

Donor Demographics

Launch with a Milestone Year

**Invite young people to serve
on your board**

**Deepen Networks with Certified
Financial Planners**

Who to ask?

Current Board

Past Board Presidents

Longtime staff / volunteers

Loyal / Frequent donors

Randy said it ...

**“It’s
Raining
Money.”**

Reflection Questions:

What are your earliest memories of money?

What are your earliest memories of philanthropy/charity?

How has that influenced your work today?



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Fundraising. Storytelling. Board Engagement.