

20 Factoids about Planned Giving

There is no such thing as a single-type of planned giving program. The reality is that there are an infinite variety of such programs. They come in various forms in varied degrees of sophistication. Planned giving programs vary by organization type, donor population, organizational budget, and a host of other factors. Yet, despite the differences from one planned giving program to the next, there are a large number of points of commonality. This list of 20 factoids about planned giving has been drawn from the book *Donor-Centered Planned Gift Marketing*:

1. Bequests are the most common form of planned gift.
2. Almost everyone has the ability to make a planned gift.
3. Bequests are the major gift of the middle class.
4. The average age of someone who makes their first charitable bequest commitment is 40-50.
5. High-income women are more likely than men to use complex gift planning tools.
6. Women are more likely to give a bequest to religious, health, human services, and environmental organizations than men.
7. Those without children are far more likely to make a planned gift.
8. Only 5.3% of those over 50 have made a charitable bequest commitment.
9. 33% of Americans are willing to consider a charitable bequest.
10. While 1% of Americans have created a Charitable Remainder Trust, 5% are willing to consider one.
11. Once donors name a charity in their will, they almost never remove it.
12. Only 37% of those over 30 are familiar with the term “planned giving.”
13. Among those over 30, only 22% say they have been asked for a planned gift.
14. Real donor stories work much better than fictional, composite stories.
15. For ads and letters to those over 40, a larger font is needed to get them read.
16. Using a challenge grant for a planned gift appeal can create urgency leading to action.
17. Donors usually give to things or causes that are important to them, not for the benefits.
18. The best source for information about a prospect is the prospect.
19. Tax avoidance is NOT a powerful motivator for planned giving.
20. Organizations will not usually get the gift unless they ask for it. So, ask!

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