

Brochure

Your general planned giving brochure should be a concise and graphically arresting summary of your case statement. (You can find the explanation and brochure template given here in *Your Case* under *Getting Started*. A more detailed explanation on developing the case statement is found in *Using the Case*, also under *Getting Started*.)

Imagine the template below in a four-page format, about the size of a typical newsletter, with lots of white space and strong pictures. (The Coach does not believe in quietly understated planned giving promotions.)

Your first job is to summarize in a memorable way why your organization needs and deserves planned gifts. Think of what your organization would do with planned gifts if it had them in abundance. Capture that in the brochure headline. For example, St. Christopher High School's planned giving program has a clearly focused goal: to build a \$50 million endowment that will allow the school to admit students who are academically qualified but in need of financial help. The school is trying to appeal to loyal older graduates who realize they received an excellent education from St. Christopher's years ago when their families, most of them of modest means, could afford the tuition due largely to an abundance of skilled, inexpensive labor provided by the religious who were their teachers. The case is summarized in the headline "**Open a door once opened to you.**"

As you will see below, the school then spells out the case in specific dollar terms needed for specific purposes. The endowment-fund numbers, left blank here, were filled in by the school that is the model for this example. Not every nonprofit may want to be so specific in public, but your organization should at least have a formally approved dollar goal for its planned giving program and should specify how it plans to use the funds received