

Insert Cards and Email Blasts

There are simple, inexpensive inserts that can promote planned giving to loyal donors you are writing to anyway. Do not send them with appeal letters since they will distract from your main message. But you have other opportunities: symphonies, nonprofit theater groups, operas and other arts organizations can insert them without offense when they send out season tickets. Other organizations can send them with routine gift acknowledgements. With a little editing, you can send them as email blasts to the ever-increasing percentage of your donors who are comfortable with computers.

The eternal debate will continue as to whether such inserts make your message of thanks seem self-interested. It is the rare donor that will take offense, as long as the planned giving insert is an offer of information rather than a request for a gift. Here are some examples, suspiciously similar to some of the copy suggest in *Ads* under *Promotions*:

Example one:

Three good reasons you should have an up-to-date estate plan:

1. Your family
2. Yourself
3. Our cause

Please send me your free estate planning kit on wills and living trusts.

Request your kit by calling the organization at (phone number).

The organization encourages all its donors to have up-to-date estate plans. The estate planning kit is for educational purposes only and is not a substitute for legal advice. Information is provided confidentially.

Example two:

Why you may want a charitable trust:

- To sell real estate or stock without tax
- To receive income for life
- To earn an immediate tax deduction
- To provide controlled income to others

- To reduce estate tax
- To support our organization

Please send me your letter on the tax and income benefits of charitable trusts.

Request the charitable trust letter by calling our organization at (phone number).

(The organization encourages all its donors to seek qualified independent counsel in establishing a charitable trust. Information in this matter is for educational purposes only and is provided confidentially.)

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Example three, four, etc.

If you have a gift annuity program or pooled income fund, you can easily adapt this simple insert format to get your message out about those specific instruments. The main issue is not writing and printing the insert cards, but making sure you have a system that gets them inserted in the appropriate mailings or sent out on a regular schedule *via* email. Unless you're a one-person shop, this may take the cooperation of another department head. Let them see and approve the text well in advance.