

Quick Plan Activities List

1. Develop draft of planned giving case statement. **Completion Date:**
2. Form planned giving committee able to meet about four times a year, with major focus on one-to-one meetings with prospects. **Meeting Schedule:**
3. Ask board members to approve case statement and make their own planned gift commitments, with volunteers/planned givers as main speakers. **Completion Date:**
4. Set up system of technical support to allow you to provide information on the tax and financial consequences of charitable trusts, life estates, bargain sales, and other gift strategies of a technical nature. **Completion Date:**
5. Hold (put a specific number here) in-person conversations, with volunteers involved, with planned giving prospects, inviting them to become members of the Legacy Society and describing methods of joining. **Completion Date:**
6. Make planned giving presentation(s) to volunteer groups. **Completion Date:**
7. Provide orientation to committee on planned giving ethics and techniques. **Completion Date:**
8. Begin publishing planned giving information, especially donor case histories. **Publication Schedule:**
9. Develop planned giving Legacy Society recognition program. **Completion Date:**
10. Explore possibility of estate planning seminars. **Completion Date:**
11. Develop interactive planned giving website: **Completion Date:**
12. Encourage donors to get their estate plans organized by providing them with an estate planning organizer and estate planning education on your website: **Completion Date:**
13. Present Committee and Board of Directors with planned giving activities and goals for the year: **Completion Date:**
14. Review five-year donor patterns with committee. **Completion Date:**
15. Survey a few other comparable institutions and ask what they've done that has promoted planned gifts successfully. **Completion Date:**

16. Evaluate planned giving program: (1) Was plan for the year implemented?
(2) How many new members in Legacy Circle?

If you want more information about Quick Plan Activities, download the *Quick Plan Commentary* and look up the item, or visit the *Presentations* and *Promotions* sections in *Marketing*.