Planned Giving

Planned giving programs play an important role in charitable fundraising.

Introduction
Planned giving is charitable giving that is deferred to sometime in the future (often at death) and is formally integrated into a person’s overall financial and estate planning. Planned giving methods range from straightforward bequests to more complex mechanisms such as charitable gift annuities, charitable trusts, and pooled income funds; many offer tax or other financial benefits to donors, and are therefore appealing to people who plan to make large gifts.

This guide provides links to resources to help nonprofits understand planned giving and operate successful planned giving programs. See the Planned Giving library topic at ConservationTools.org for these and other resources.

Understanding Planned Giving
“Planned Gifts: The Introductory Guide”
“What Is Planned Giving?”
“10 Things You Might Not Know About Planned Giving”
“Planned Giving 101: The Legacy a Donor Leaves Behind”
“Four Common Planned Giving Myths Busted”

Planned giving fact sheet

Donation by Will: Options and Issues Regarding Gifts of Cash, Land, and Other Property

Operating a Planned Giving Program
“How a Nonprofit Can Start and Market a Planned Giving Program”
“You Can’t Take it with You: Big Gifts for the Future”
“How to Launch Planned Giving at Your Nonprofit”
“10 Steps to Developing a Planned Giving Program”
“Checklist for Planned Giving: What Tools Do You Really Need?”

Establishing a Planned Giving Program

Identifying and Cultivating Donors
“The Best Ways to Identify a Planned Giving Prospect for Your Nonprofit”
“The Keys to Identifying a Planned Giving Prospect”
“Identifying Planned Giving Donor Prospects”

How to Talk with Donors About Planned Gifts
“How to Talk to Donors About Planned Giving (and Win Them Over!)”

Examples of Land Trust Planned Giving Programs
Many land trusts have planned giving programs. See the websites of the organizations listed below to get a sense of how different organizations structure and market their planned giving programs.

Deschutes Land Trust
Estes Valley Land Trust
French & Pickering Creeks Conservation Trust
Minnesota Land Trust
Natural Lands
North Branch Land Trust
Sonoma Land Trust
The Trust for Public Land

The most recent version of this guide and related resources can be found online at ConservationTools.org/guides/171

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