

# Marketing for Bequests

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The simple *bequest*, which is a charitable gift in a donor's will (or living trust), still accounts for most planned gifts. Bequest marketing should be a part of every fund raising program, even in the smallest one-person development shops. Simple marketing messages about bequests can reap huge future revenues for your organization. It is a huge mistake not to seek them.

All of your loyal donors are good prospects for a bequest, so you need to get a consistent message out to them regularly. Let them know that you are interested in gifts by will. The idea of arranging a bequest simply does not occur to most donors, unless they are reminded of it. Provide them with a steady stream of reminders.

Put your bequest reminder message in all of your communications. The message is simple: *Please remember us in your will.* Include this bequest tag line on your stationery and your donation receipts. Make sure every newsletter contains a brief article or a simple display ad about leaving a bequest. Add basic information on bequests to your website.

Let your donors know how important bequests are to your charitable mission. Whenever possible, make use of testimonials and stories about people who have already arranged bequests and why they did it. Emphasize the idea of leaving a bequest for endowment. People like the idea of leaving their bequest to an endowment fund that will go on supporting your organization after they are gone.

Prepare a simple fact that tells your donors about the different types of bequests and how to arrange a bequest. Make sure you include your organization's exact legal name and address, so their lawyers can write the bequest correctly. Improperly worded bequests can cause major headaches during probate, when it is too late to correct your organization's name..

Once you have your fact sheet, take every opportunity to offer it your donors. Offer it in your newsletter and on your website. Include a check-off box on your donation envelopes, that says *Please send me information about arranging a charitable bequest.* Always carry a few copies with you when you are visiting your donors.

Remind your donors why it is so important to have a will. Most Americans do not have a current will, and this is true of your donors as well. The lack of a will can cause serious and unforeseen harm to surviving family members. Lawyers who serve on your Planned Giving Committee can write articles on this subject for your newsletter. Offer seminars on wills for your donors. Invite your donors to a "wills clinic" with volunteer attorneys. They are more likely to take action on a bequest if they are motivated to get their wills in order.

Develop a visible and attractive donor recognition society for your bequest donors. A heritage society encourages your donors to disclose their bequests, and it allows you a wonderful opportunity to properly thank them. Good donor stewardship is essential for preserving bequests, once they have been arranged.

For more tips on successful planned gift development, visit our website: [www.pgcoach.com](http://www.pgcoach.com)

This article was previously published in *PG-Mentor*

