

Practical Planned Giving in a Small Shop – Don't be Afraid!

Presented by Steve Spriggs, Director of Planned Giving at Fresno State.

Most avoid Planned Giving because:

- It is too complicated
- No expertise
- No time
- No money
- Not comfortable with the "Mortality Discussion."

Create a circle of experts that you can call on to assist when any of the reasons above prevents your move toward a planned gift.

Core message: Don't Be Afraid.

Donors with capacity usually already have established and trusted professional advisors. You don't need to know it all. That's what your experts are for.

Leadership **MUST** be willing to invest in the long-term relationship and to pay for it **without** an immediate (or even measurable) return on investment.

Seek and obtain an organizational willingness to commit from *all* leadership levels.

Planned Giving should be part of your budget. The biggest expense is staff time.

Is your organization prepared to STEWARDSHIP FOR LIFE??

Planned Giving is **relational** not transactional. The Donor's trust must be established in you, your organization and your mission before dirty family secrets are discussed. Such discussions usually precede a planned gift commitment.

Most donors are afraid they will outlive their wealth. So steer them to a gift after death.

Seek those donors that have given 5 to 7 years in a row. The amount given really does not matter.

How do you turn the conversation to a discussion on their estate? By asking the simple question: "Will you consider leaving a gift in your will?"

Always be certain that they have first taken care of their own future needs, their family's future needs, and THEN to consider a gift from any remainder.

A gift left in a will is an investment in the future.

Advise donors to list your organization's full legal name with your organization's taxpayer ID number as the beneficiary when completing their will or trust.

Market Planned Gifts by putting a story of someone who has done so in your newsletter.

Storytelling plants the seed for someone to think “Well, if he could do that, *I* can do that too!”

Donors give when they are ready to give, you cannot pressure them. (Bosses need constant reminders.)

Create a Donor Society to recognize the special few who tell you that your organization is in their will!

Many donors prefer to remain anonymous. Be sure to have an “Iron Clad” system to honor their secrecy.

Find those in your organization who are not squeamish about the subject of death. Take them with you.

Suggested Reading: “The Millionaire Next door” by Thomas J. Stanley.

CONCLUSION:

- PLANT SEEDS everywhere!
- Water & fertilize regularly. (Engage them. Nurture their passion.)
- Ask professional crop experts for help when it gets too complicated.
- Do not harvest prematurely! (Donors Give When They Are Ready To Give!)
- Do not share the crop with anyone without the donor’s blessing (Anonymous?)
- Tell the world about the harvest! Others will want to play in your garden!

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For further information, do not hesitate to contact the presenter:

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***Have you included Fresno State in your will?***