



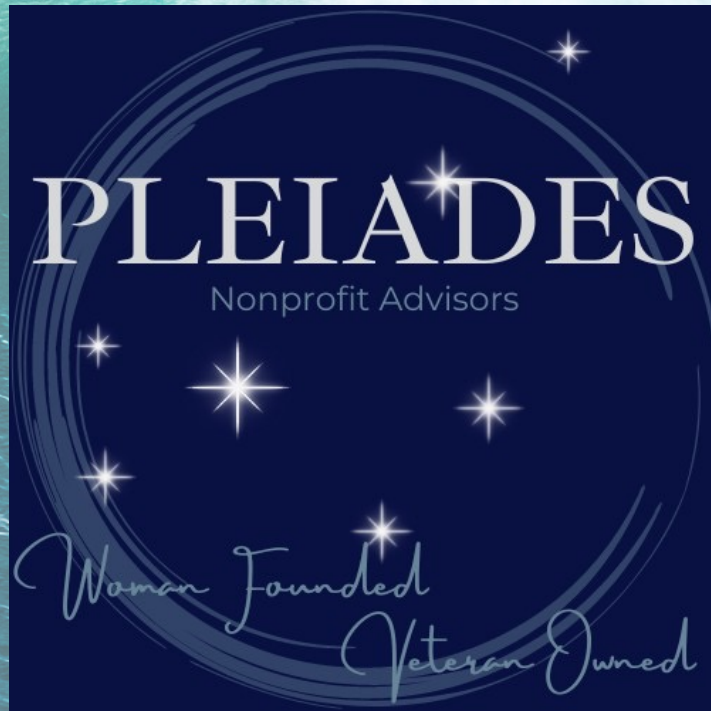
Creating Donor Momentum

With Sequential Marketing Campaigns

Engage

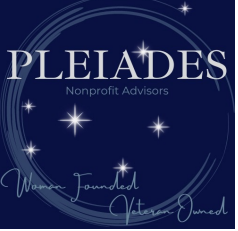
Educate

Empower



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Andy Ragone, CGPP
CEO, Co-Founder, & Partner
Pleiades Nonprofit Advisors



Building Donor Momentum with Sequential Marketing

PG Marketing... to What End?

PG Marketing Campaigns

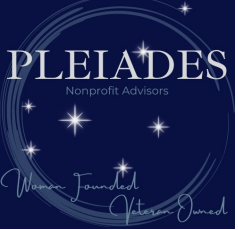
Why Advisors?

Why a Seminar Program?

Advisor Follow Up

Annual Legacy Event





Planned Giving & Major Gifts of Assets

Unlocks giving from wealth, not discretionary income

\$5-11 Trillion in the next 20 years

Increased annual giving +\$3,000/household/year

2.7x more than total lifetime giving (greater % for larger estates)

Highest ROI of all fundraising

Five-year non-profit average growth in total donation revenue...

11%

Cash only gifts

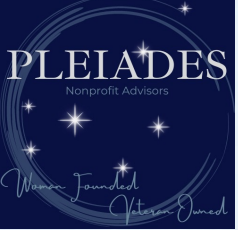
50%

Any non-cash gift

66%

Securities non-cash gifts
(including real estate and business interests)

Dr. Russell James Ph.D, J.D., CFP, Texas Tech University (Study conducted 2010-2015)



With \$Trillions coming...

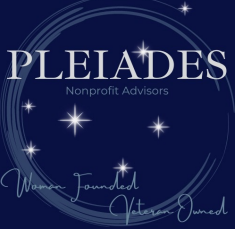
A large, powerful ocean wave is breaking, with a person surfing on its face. The water is a vibrant turquoise color, and the white foam of the wave is prominent. The surfer is a small figure in the distance, riding the wave's face.

**...How Do We
Catch
The Wave?**

PG Marketing...

Goes beyond what
we might think





8-Month Donor Journey

Marketing

**Content
Engagement
CTAs**

Estate Planning Seminars

**Face to Face
Connections**

Advisor Follow Up

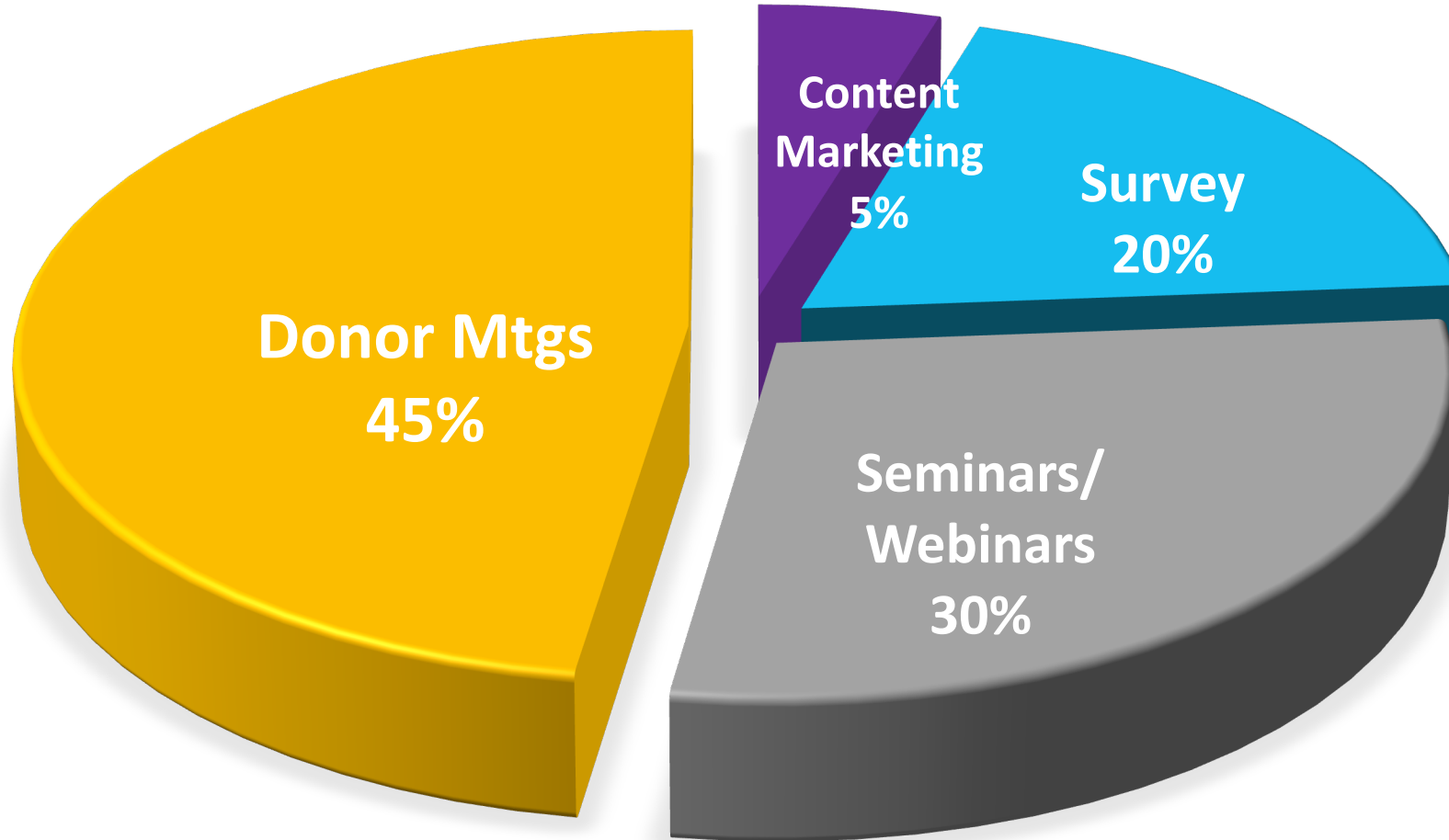
No Gaps

Complete Plan

Legacy Event

Building KLT

Sequential Marketing CTAs



Why Segmentation

Marrying the right messaging to the right audience

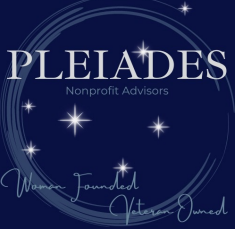
- Specific demographic
- Specific stage of life
- Specific “pain points”
- Keep cleaning your lists



Segmentation Makes it Personal

Why a Marketing Calendar

Marketing Focus: Membership, Webinars, Advocacy, WRPGC					
Action/Task	Responsible Person(s)	Estimated Timeframe	Deadlines	Estimated Cost	Notes
2021					
JANUARY					
enewsletter	Planned Giving Director, Marketing	Monthly		0	
LinkedIn posts	Andy	after each eblast		0	
eblasts	Derek	Weekly		0	Webinars, Advocacy, General, WRPGC
GM: Jan 21; TBD: added webinar or Mini RT					
FEBRUARY					
enewsletter	Planned Giving Director, Marketing	Monthly		0	
LinkedIn posts	Andy	after each eblast		0	
eblasts	Derek	Weekly		0	Webinars, Advocacy, General, WRPGC
Post card	Conference Co Chairs			8000	WRPGC
TBD: some version of PG201					
MARCH					
enewsletter	Planned Giving Director, Marketing	Monthly		0	
LinkedIn posts	Andy	after each eblast		0	
eblasts	Derek	Weekly		0	Webinars, Advocacy, General, WRPGC
GM: Mar 18; TBD: added webinar or Mini RT					
APRIL					
enewsletter	Planned Giving Director, Marketing	Monthly		0	
LinkedIn posts	Andy	after each eblast		0	
eblasts	Derek	Weekly		0	Webinars, Advocacy, General, WRPGC
TBD: added webinar AND Mini RT or social					
MAY					
enewsletter	Planned Giving Director, Marketing	Monthly		0	
LinkedIn posts	Andy	after each eblast		0	
eblasts	Derek	Weekly		0	Webinars, Advocacy, General, WRPGC



What to Market

Current Gifts

- QCDs – Quarterly and Q4
- Appreciated Property –
Quarterly and Q4
- DAFs – Q1 and Q4

Future Gifts

- Bequests – Monthly –Available
Wills Guide
- Beneficiary Designations
- CGAs (if appropriate)

Events

- Estate Planning
Seminars
- Wine and Wills
- Legacy Events

* Online marketing; Print subject to budget and seminar/event invites

**Complex Giving Conversations/Proposals Emerge Later

Board Involvement

- Key influencers
- Professional advisors who sit on the board
- Often unaware of gift planning options
- Legacy, QCD and DAF involvement
- Help me... Help You



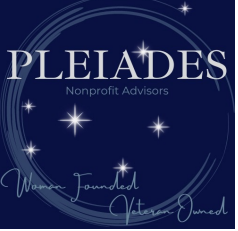
Leveraging Estate Planning Seminars



&



Advisor Partnerships



Results

- Realized and New Expectancies from \$1M-\$3M in the first year
- Within Five Years, Totaling over \$20M
- Dedicated Staff, No Turnover
- Happy Advisors and Happy Leaders
- Happy and Educated Donors

Advisor Partnerships

- Planned Giving Advisory Board
- Mission Aligned
- Advice and Questions
- Referral List for Donors
- Speakers Bureau
- Follow Up Consultations Offered
- Organization Liability?



Where do I find them? Recruitment

- Organization Connections
- Advisory Board
- Self Identify
- Community Connections
- Networking
- Spanish Speakers



Vetting Advisors

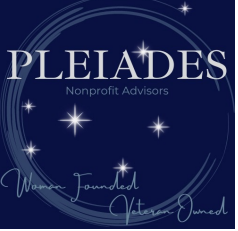
- Volunteer Disclaimer
- Due Diligence
- Member of Bar in Good Standing
- Liability Insurance
- 50% Estate Planning
- In-depth Interview
- Financial licenses/FINRA



Advisor follow-up

- Mutually Beneficial Relationship
- Conduct Consultations after the Seminar
- Move Forward with Estate Plans and Gifts
- Encourage Client Giving
- Provide Donor Info Back to You





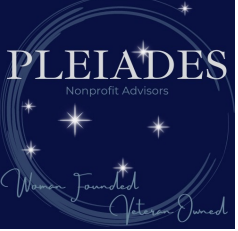
What Is a Seminar Program?

Estate Planning Seminars given at organization headquarters or convenient local space

Provides general info on what is needed in an estate plan – wills, trusts, powers of attorney

Is done by PG staff, attorney and financial advisor

Primary focus is on Estate Planning, secondary is planned gift information



Why Do We Conduct Seminars?



Your organization may be involved in many important aspects of life



Your organization becomes a source of information



You value your stakeholders



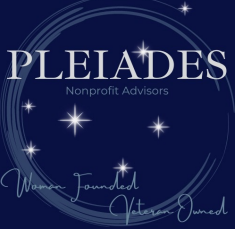
Everyone needs an estate plan



Focus is not on giving



It may lead to a planned gift



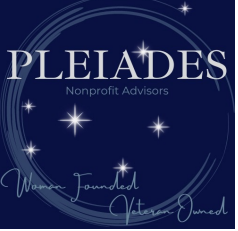
Gifts from Seminars

We normally receive 1-2 gifts per seminar, initially

We received 45 gifts from 44 seminars

Seed is planted, will return

- Takes 6 months to 3 years or longer
- Exponential growth
- Must continue stewardship

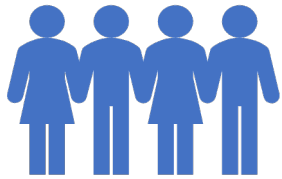


Marketing and Set Up

- Market as **Estate Planning Seminar**
- Adhere to 4-6 week timeline for marketing – ED's outreach letter and newsletters and social media announcements
- Get RSVP count before seminar
- Refreshments
- Bring your handout kit containing statutory documents and Estate Planning Guide
- Confirm venue and access to electrical and AV

Developing a Legacy Society

Start Here



**Develop
Legacy Society**

Logo and Name
Determine Benefits



**Invite people to
give in will or
trust**

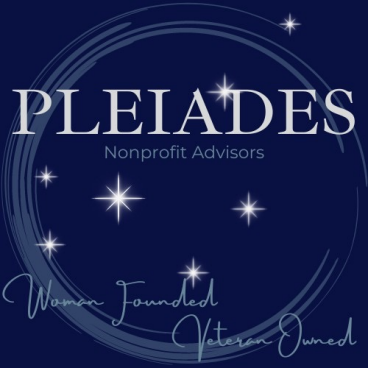
Include on email signature
Include on all mailings



**Publish names of
members,
welcome new
members**



**Hold annual Legacy
Society Reception,
thank members**



Thank You!

**Join Pleiades Nonprofit Advisors
Mailing List for cohort groups, blogs,
forms and more!**



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