Putting the Plan in Planned Giving

Your Post-Conference Playbook

September 18, 2025

OHSU Oregon Health & Science University FOUNDATION

Agenda

- Introductions and session goals
- Starting with you
- Adding value to your organization
- Building a network of peers and mentors
- Partnering with the right advisors
- Putting the pieces together for your donors
- Ethics, integrity, and spidey senses

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Ask dumb questions.

Someone in the room will be relieved that you did.

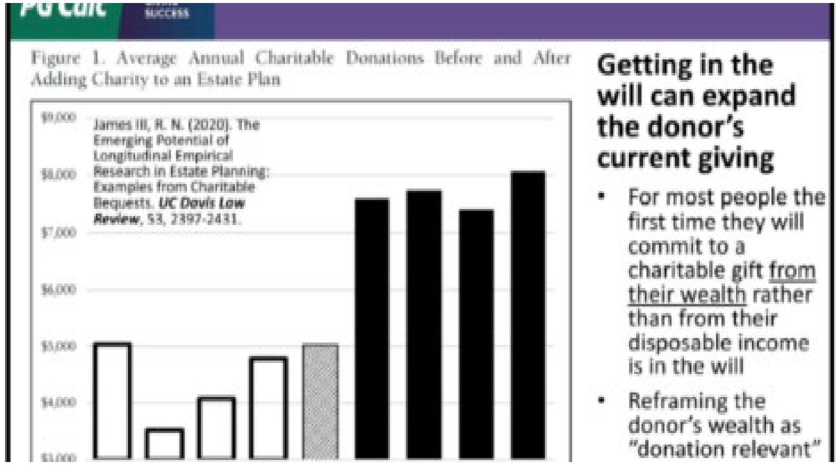
Identify goals

Create a plan

Take action

Why invest in Charitable Gift Planning?

You will raise more money, earn trust, and develop deeper donor relationships



- Bequests have the highest ROI of any fundraising activity
- Legacy donors become more engaged over their lifetime
- Bequest and asset gifts are among the largest an organization will receive

- Every donor can be a major donor at least once
- A gift in a will or trust, or a gift of an asset, will be larger than many donor's cash giving capacity in their lifetime
- You get to offer, not ask

- Donors who include you in their estate increase their current giving during their lifetime
- Donors who include you in their estate are more open to learning about asset giving during their lifetime

People make major gifts from their wealth, not their wallets – 90% of net worth is held in assets, not cash

Part I
Starting with you

You are a charitable gift planner.

- You do not need to be an expert to add planned giving to your donor work
- You do need to be authentic, genuinely curious, and have a very basic understanding of taxes
- You need to be an excellent listener
- You are listening for cues where gift planning can provide your donors with solutions, help them achieve their goals, and have impact on your mission.
- So how do you start? You can be a gift planning student around the clock, for free

1. Connect

with others in this room to find learning and accountability partners.

- Link In, swap numbers, share business cards
- Start a group chat
- Meet for (virtual) coffee
- Share resources, webinars, review ideas and strategies, do cringey role plays, learn together, celebrate wins

2. Schedule

Pull out your phone and put an hour on your calendar next week to devote to processing, goal setting, and planning

- As you set goals and craft your plan, be disciplined about holding time to learn, connect, and implement
- Honor your time and your commitment to yourself

3. Summarize

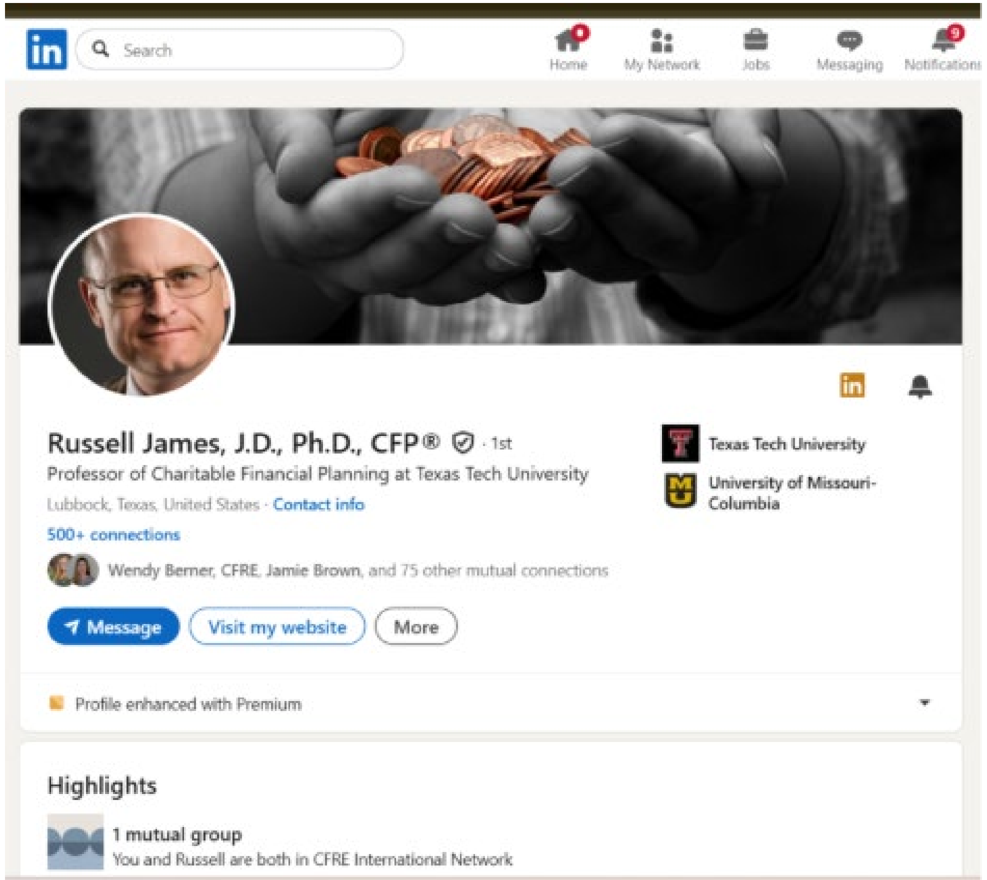
Summarize today's conference. Dictate to your phone on your way home

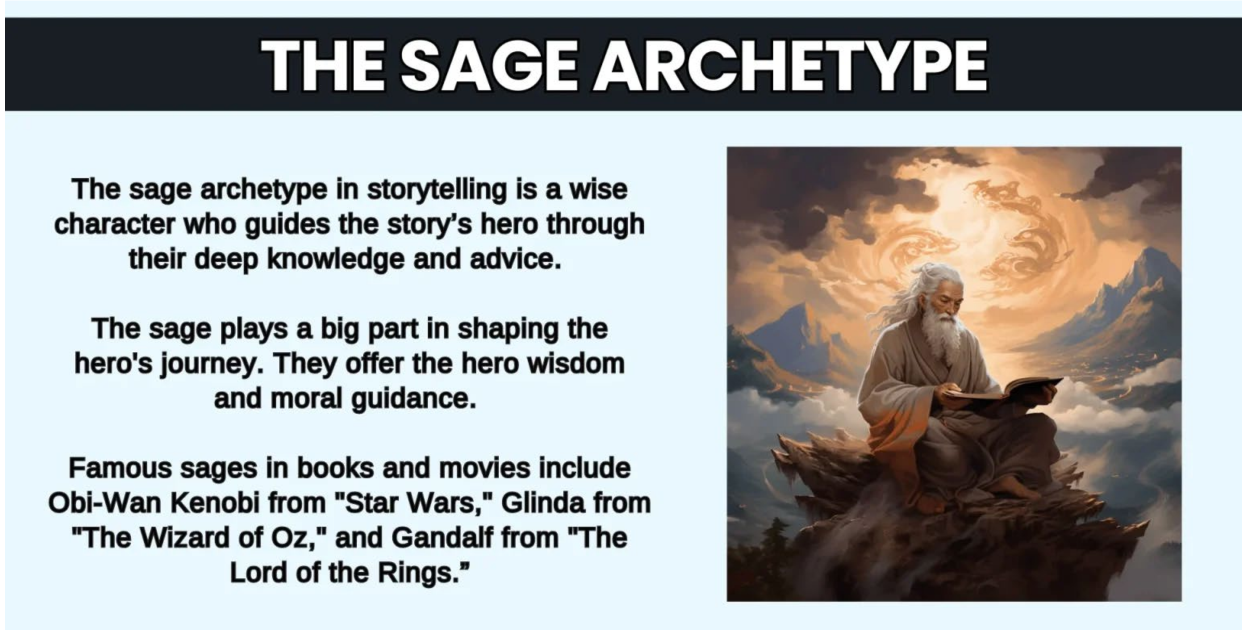
- Specific takeaways from sessions
- Who did I hear from or connect with that was exciting?
- How did this learning relate to my own goals, and the goals of my organization?
- What inspired?
- What overwhelmed?

4. Connect with Dr. Russell James

on LinkedIn and follow him on YouTube. Do it now.

- Data driven
- Easy to understand language
- Covers everything
- Free!





5. Build your learning library

Charitable Solutions

PG Calc

Stelter

FreeWill

Crescendo

CCS Fundraising

National Association of Charitable Gift Planners (NACGP) and affiliates

Veritus Group

Market Smart

Snoop on the pros

Find resources from the teachers – CSPG, Lilley School, CFRE, CAP

6. Prioritize your learning goals

- Start with what will serve the donors you have today, and what is realistic to learn
  - Bequests
  - Qualified Charitable Distributions (QCDs) from a qualified IRA account
  - The Secure Act
  - Donor Advised Funds (DAFs)
  - Charitable Gift Annuities (CGAs)
- Charitable Remainder Trusts, Real Estate, Lead Trusts, Retained Life Estates – not now
- Think about real donors you already know and use them as case studies

7. Bookmark the IRS

https://www.irs.gov/charities-non-profits/charitable-contributions

- The business of the IRS is forced taxation
- Every time a dollar changes hands, the IRS takes a bite
- Charitable tax codes exist to encourage giving
- Nonprofits serve communities in ways that government can't, and private industry won't
- If a donor asks WHY, the answer is usually, the IRS
- Learn from your donors about their tax concerns and goals

Part II
Adding value to your organization

8. Normalize and cultivate

a culture of charitable gift planning

- Add to your email signature block: ***Please consider a gift in your will or trust***
- Ask for time at a team meeting or board report to share your conference summary
- Request that planned giving be a recurring agenda item
- Normalize legacy fundraising as much as annual, major gifts, and events
- Include asset giving options in annual campaigns and events
- Make blended asks a regular part of donor conversations
- It is appropriate to invite your most loyal supporters to include you in their future plans

9. Prospect from within

- Identify the leaders, decision makers and resource managers at your organization, and how they align with your goals. Who can help you or your program grow? Who can take you along for the ride?
- **Treat them like donors**
- Share your post-conference write up with your supervisor, board chair, head of the gift planning team *and thank them for investing in your growth*
- **WIIFM** – lead with value to the org

10. Become the pro in FAQ's

- Find or create sample bequest language and make it easy for your donors to find on your website, along with legal name, address, and Tax ID number
- Learn how to explain a gift of a specific asset, a specific amount, or a percentage of the total estate
- Learn house policy on revocable gifts, documentation and booking standards
- Find your org's Gift Acceptance Policy and study it
- Become the house expert

Bequests represent 90% of charitable planned gifts

(put this on your calendar right now)

Part III
Building your network of peers and mentors

Networks build careers.

Is your next boss at this conference?

11. Build conference connections

- Speakers, board members, sponsors, volunteers, new friends
- Follow leadership organizations
- Subscribe to their legacy mailings
- Sign up for their webinars
- What do they offer donors?

12. Set SMART goals

- How many meaningful connections am I aiming for?
- How does this person align with my strategic goals?
- When am I putting in time to connect?
- Write the plan and calendar it

13. Treat them like donors

- Respect their time
- Be specific in your ask
- Offer specific times and be the administrator
- Follow up with the impact of their gift of time and conversation
- Be your real self. The best networking grows into authentic relationships

14. Become a member of the Northwest Planned Giving Roundtable.

- Visit NWPGRT.org
- Membership is $100
- Discounted rates for membership meetings held five times per year virtually or in-person (typically in the Portland metropolitan area)
- Discounted rate for the Northwest Planned Giving Roundtable Annual Conference, held in Portland each September
- Discover job opportunities and post listings at discounted rates
- Opportunities to participate in the NWPGRT Mentorship program by serving as a mentor for others or learning by the side of an experienced member
- Volunteer on the 2026 conference planning committee

Part IV
Partnering with the right advisors

14. Map your goals

with specific outcomes and applications

- Which of my goals – personal, organizational, donor – would benefit from a professional advisor?
- Start at home – your board of directors, advisory council, sub-committees, close network. Who should I talk to, and how to leverage that connection?
- Ask your donors! Who are they working with on their own plan?

15. Treat them like donors

- Be strategic. Don't waste their time if they aren't part of your plan
- Cultivate – introduction, why I'm writing, specific and time-bound request, offer times and method
- Solicit – what exactly are you asking of them?
- Steward with thanks and impact
- Add value to their work by highlighting benefits to their clients - earn their trust

16. Join your donor's team

- You are not asking, you are part of the advising team
- Earn a spot at the table by leading with value to the donor
- Move at the speed of trust - their goals come before your metrics
- If you are going to offer to connect them with experts, be ready
- Be honest when you don't know and offer to learn together

Part V
Putting the pieces together for your donors

18. Memorize and practice this sentence:

"I am not a licensed professional and strongly encourage you to seek the advice of your tax, legal and financial advisors."

Practice till it rolls off your tongue. Use it in conversation, include it in emails, especially if you are talking about taxation or irrevocable gifts.

This means, please don't sue us!

19. Review your portfolio

Review your portfolio and identify 1-3 donors to strategize a legacy conversation

- Long and loyal
- Pattern of increased giving
- Have shared asset information, or a vision for the future
- Have a life event – retirement, home sale, business transition
- Are 70-72
- Magic words: no kids

- Calendar your goals and hold yourself accountable
- Ask a supervisor or peer to review your list and strategies

20. PRACTICE

- Ask a friend or peer to role play
- Lean on "donors like you"
- Ask for permission to ask
- Play to their motivators
  - Longevity or permanence
  - Social capital (Legacy Society)
  - Lasting impact - hero
  - Tax solutions
- Be prepared for multiple conversations and drip drip drip
- Take the pressure off and offer to be part of their team without solicitating – position yourself as a solution

21. Connect with your legacy donors in real ways

- You are talking with a real person about what happens when they die, about the culmination of their life's work, about how their wealth aligns with their values
- Be your real self - don't be a walking brochure
- Show 'em you know 'em! Include personal conversations in your contact reports, and remember their birthdays or other special occasions

Part VI
Ethics, Integrity, and Spidey Senses

22. Download

the MODEL STANDARDS OF PRACTICE FOR CHARITABLE GIFT PLANNERS from the NACGP

- Three pages, ten points, easy to understand
- Read it, review with peers, think about situations it may apply
- Add this to your library
- Share this with your organization

23. Ensure Charitable Intent.

"The principal basis for making a charitable gift should be a desire on the part of the donor to support the work of charitable institutions"

24. Prepare yourself to work with older adults

- Familiarize yourself with elder abuse and financial fraud
- Learn if you are a mandatory reporter. In the state of Oregon, adults age 65 and older are considered vulnerable
- Learn signs of cognitive decline
- Keep detailed records. In Oregon, one-party recording is legal. Write your contact reports as though they may be read aloud in court.
- Understand that your role may be viewed with suspicion by family. Try not to take it personally!
- You will hear some sh*t. Be confidential and tactful.

If your instincts are telling you something is amiss, go to your supervisor ASAP

25. Fly!

- You are a charitable gift planning professional. Put in on your LinkedIn profile.
- You do not need to be an expert to do this work
- Create specific goals
- Write a plan
- Make it SMART
- Take action
- Support each other and pay it forward
- Change the world!

Your Post-Conference Playbook

Part I - You

1. Connect
2. Schedule
3. Summarize
4. Dr. Russell James
5. Build your library
6. Prioritize your learning
7. Bookmark IRS.gov

Part II – Your organization

8. Normalize culture of gift planning
9. Prospect from within
10. Become the pro in FAQ's

Part III – Your network

11. Build conference connections
12. Set SMART goals
13. Treat them like donors
14. Join the NWPGRT

Part IV – Professional Advisors

15. Map your goals
16. Treat them like donors
17. Join your donor's team

Part VI – Your donors

18. I am not a licensed professional
19. Review your portfolio
20. Practice
21. Be a real person

Part VI – Ethics and integrity

22. Download Moral Standards
23. Ensure charitable intent
24. Working with older adults
25. **Fly!**

Thank you.

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