



## Starting a Planned Giving Program

### IW Development 9-Step Plan

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***A simple, straightforward plan to establish your program now!***

1. Assessment and qualifying of your donor database
2. Educate and enlist your board
3. Create your donor centric brand and marketing materials
4. Mine your database and segment your lists
5. Set one-on-one meetings with good candidates to get early acceptance
6. Build a groundswell of positivity with meetings, calls and emails
7. Launch the program with a multi-media campaign, a live or digital event, and make personal connections with donors
8. Make follow up calls and schedule future mailings
9. Set up your Legacy Society and look to the future

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***Contact us today to discuss your Planned Giving Program***