

# Planned Giving Checklist

We have outlined some key actionable items that can help propel your organization's planned giving program.

✓ **Re-visit your gift acceptance policy**

- Non-profits should have well-defined procedures for what type of gifts their organization will accept and what their process is for accepting them
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✓ **Keep an open line of communication with donors**

- Provide donors with ideas and information on a regular basis
  - Host appreciation events for donors (breakfasts, receptions, etc.)
  - Some of the best donors to ask for a planned gift may be those who give smaller amounts over a long period of time
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✓ **Market your planned giving program**

- Show donors how your organization is making a difference in the community and how their gift will make a lasting impact
  - Use personal visits with major donors
  - Consider creating a giving society to help identify planned gifts and engage donors
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✓ **Build a profile of donors you want to target**

- What type of donor will your organization resonate with? Are they at a point in their life where it's appropriate to make the ask?
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✓ **Be flexible with donor needs**

- Some donors have a strong desire to leave a legacy
- If a donor expresses regret they cannot give now, stress that they can give later via a bequest

We offer services that align your goals with the right tools to achieve them. From meeting spending needs and evaluating investment options, to fiduciary best practices and fundraising support, Manning & Napier is committed to partnering with your organization to help it achieve its mission. **Visit [www.manning-napier.com/EFservices](http://www.manning-napier.com/EFservices) to learn more.**