

Damen Diamonds for Planned Giving
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- 1. Commitment from Management**
 - ◆Appropriate staffing structure
 - ◆Identifying the types of planned giving vehicles to market
 - ◆Gift acceptance standards
 - ◆Excellent donor service and stewardship
 - ◆Relationship/responsibilities with legal and financial staff
 - ◆Understanding the long term nature of building a successful planned giving campaign

- 2. Develop a Business Plan**
 - ◆Define the strategic direction
 - ◆Determine audience
 - ◆Share with internal staff & senior management who may not be familiar with PG
 - ◆Reasons why PG vital to growth of organization
 - ◆Time line and goals
 - ◆Recognition society
 - ◆Web site
 - ◆Center of influence cultivation – lawyers, financial planners

- 3. Marketing and Lead Generation**
 - ◆Define the donor base
 - ◆Educate donors, prospects and professional advisors
 - ◆Continuity, repetition and perseverance
 - ◆Identify prospects with both the capacity (ability) and inclination (willingness) to give
 - ◆Think assets not income
 - ◆Bequest Awareness – Tag line on all material – Remember X in your estate plan

- 4. Prioritize Planned Giving Prospects**
 - ◆Longevity of giving
 - ◆Level of giving
 - ◆Loyalty – number of gifts
 - ◆Contact donors to say thank you for support ask what motivates to give - LISTEN
 - ◆Review age of individuals on file
 - ◆Personally visit prospects

- 5. Stewardship**
 - ◆Maintain regular contact- call to see how they are doing
 - ◆Involve donors in organization work – ownership of mission
 - ◆Include in recognition society
 - ◆Send handwritten note, birthday cards, and holiday cards
 - ◆Share yourself with your donor –stories, pictures – they will share too.



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