



# BREAKTHROUGH PHILANTHROPY, INC.

YOUR PLANNED GIVING SPECIALIST

*The Planned Giving Key: Lock in tomorrow's gifts today!*

August 4, 2009

## IN THIS ISSUE

Welcome Message

Feature Article

Breakthrough Tips

## SUBSCRIBE

Was this newsletter forwarded to you by a friend? [Subscribe now](#) so you don't miss an issue.

Dear Kathy,

Welcome to **THE PLANNED GIVING KEY**<sup>™</sup>, a newsletter to help you increase your fundraising success with planned gifts.

Americans are an innovative bunch. People are out of work or on the cusp of losing a big chunk of their income and it could be--and sometimes is--a very glum time. But, as a result of these tough times, there's been a huge surge in the number of people starting up their own businesses; taking on the challenges we have put off when times were "good." If you ask why people didn't start these businesses in a better economy, the reasons often come down to lack of time, fear of failure, or most often - simply just refusing to climb out of their comfort zone - what I call the "One day, I'm going to..." zone. What day of the week is "one day" anyway?

Sure they may've had a greater chance for success in better financial times, but the motivation wasn't alive then. Perhaps, the opportunity wasn't as easily recognized in better times. As a small business owner for several years now, I've learned that good times or bad, **NOW** is always the best time to start. Otherwise, it doesn't get done until "one day."

**You are the community I serve** and I love to receive your questions and comments. Please send them to me at [info@breakthroughphilanthropy.com](mailto:info@breakthroughphilanthropy.com) or let me know what you *really* think on my blog, [www.plannedgivingbreakthroughs.com](http://www.plannedgivingbreakthroughs.com).

Working to Bring You *Breakthroughs in Philanthropy*,



Lorri Greif, CFRE, President  
Breakthrough Philanthropy,  
Inc.

## FEATURE ARTICLE



### NOW Is Always the Best Time to Start

By Lorri M. Greif, CFRE

As you may have already learned from reading past issues of *The Planned Giving Key*, I am absolutely passionate about planned giving. With two decades of fundraising behind me, there is no doubt in my mind that without planned giving, a nonprofit's ability to grow and sustain their mission will eventually plateau. They'll fall behind other nonprofits that actively offer their donors planned giving opportunities and they may even suffer more hardships during tough times like we're seeing now.

For example, I learned very recently a former client has just been notified of a bequest representing more than half of their normal budget. The timing is a godsend as you can imagine! The organization will begin to receive distributions shortly, and this may well **save** some jobs, salaries, and programs that were in jeopardy. While occasionally there are surprise bequests received by nonprofits who can't recall the decedent, these gifts more often come from someone who's been solicited to take this action. In this case, the amount of the bequest was surprising, but bequests aren't unusual for this nonprofit. It has actively let people know they want this type of donation for many years, and they come in regularly, although not usually for such a large sum.

The above is just one example behind my passionate belief in planned giving programs and why I'm *driven* towards success in this area of fundraising. Without planned giving, a nonprofit becomes less competitive and less able to build its mission into the future, and less able to retain donors. They lose opportunities to become "like family" to their supporters and they find it far more difficult to maintain programs and credibility.

Recognizing a need for more charities to establish planned giving programs is what moved me to become a consultant rather than work as a development professional for only one nonprofit -- although those were great times too. When I saw the need, I thought it through and then I moved as quickly as possible so that it didn't permanently become a "one day" situation. Every successful person, who first began with an idea, will tell you **not** to wait to be perfect; just do it and perfect it as you go.

So, what is holding you back from starting your planned giving program or expanding its marketing NOW? I can't guarantee you will receive a bequest right away for half your budget, but it will help to bring in other revenues and it will assuredly help secure the future. There are so many free or inexpensive ways to reach your loyal donors and friends with planned giving information.

I know that planned giving is considered "tomorrow's" revenue and everyone needs money today. But, I *can* guarantee you that tomorrow will come way before "one day" ever does.

## HOT NEWS

### Free Webinar - August 6th @ 1:30 PM

Last week, I presented my FREE webinar, *Planned Giving: Here's What It Is - Here's What It Takes*, to answer questions about planned giving so nonprofits could get off the bench and start something NOW.

An encore of my webinar was requested, so with some further fine-tuning and a new name, *Planned Giving in Plain English: Get Your Questions Answered* will be offered on Thursday, August 6th from 1:30PM EST - 2:30PM EST, sponsored by Ventureneur.

And yes, this encore webinar is FREE so what do you have to lose? After all, the reward is knowledge about planned giving and what better time to start learning than NOW? [Click here](#) to register for free.

## BREAKTHROUGH TIPS

### Easy Ways to Start Now

Here are some really easy tips to get planned giving going for your organization:

- Why not include a statement, such as "Please remember us (*ABC Charity*) in your will," on everything that reaches donors: mailing envelopes or letterhead, email signatures, newsletters, calendars, etc..
- Include a buck slip in your next mailing with bequest language on it.
- Why not start doing it NOW?