

# Make the Case for (Greater!) Investment in Your Planned Giving Program

DECEMBER 2022





# CCS AT A GLANCE

Celebrating 75 years of transformational partnerships with nonprofits.

**400+**

Professional  
Fundraising  
Staff

**600+**

Nonprofit  
Partners Each  
Year

**250+**

Campaigns  
Managed Each  
Year

**86**

Current  
Partners  
Conducting  
Campaigns

**\$12.8 Billion**

In Total Campaign  
Goals

**\$5.3 Billion**

Raised to Date

# OUR SERVICES



FUNDRAISING  
CAMPAIGNS



INTERIM  
DEVELOPMENT  
MANAGEMENT



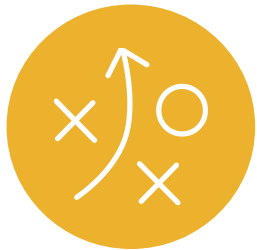
DATA ANALYTICS,  
SYSTEMS, &  
RESEARCH



GIFT  
PLANNING



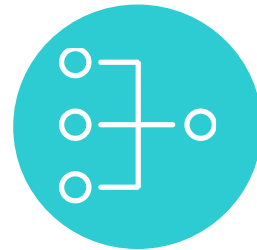
ASSESSMENTS &  
AUDITS



STRATEGIC  
PLANNING



TRAINING &  
LEADERSHIP  
DEVELOPMENT



SYSTEMS  
PROJECTS



FEASIBILITY  
STUDIES

# GIFT PLANNING PRACTICE GROUP



Claire Bens  
London



Kelly Ciotti  
Seattle



Christopher Dake  
Washington DC



Max DeLott  
New York



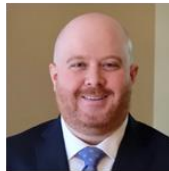
Carolyn Ferguson  
New York



M. Angel Flores  
New York



Stephanie Gilardi  
New York



Jay Gilman  
St. Louis



Paige Jorgenson  
Milwaukee



Sean King  
New York



Christianna Luy  
Phoenix



Jeremy Monty  
Milwaukee



Christina Moore  
Houston



Dominic Pepper  
Philadelphia



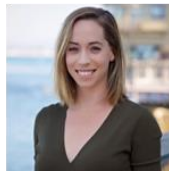
Tori Sivco  
New York



Christopher Smith  
Los Angeles



Troy Smith  
New York



Anne Thomas  
Los Angeles



Mark Urban  
Philadelphia



Hannah Yartz  
Denver



# TODAY'S GOALS

01

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DEFINE  
GIFT  
PLANNING

02

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UNDERSTAND  
PHILANTHROPIC  
LANDSCAPE +  
POTENTIAL

03

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CHART A PATH  
FORWARD

04

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MAKE THE  
CASE FOR  
(GREATER!)  
INVESTMENT

A woman with long dark hair and bangs, wearing a patterned top, is writing on a whiteboard with a blue marker. In the background, a woman with glasses and a blue shirt is pointing, and a man in a blue jacket is looking on. The scene is a professional meeting in a modern office.

# DEFINE GIFT PLANNING

# ESTABLISHING A SHARED UNDERSTANDING



Gift Planning

CULTURE



Planned Giving

PROGRAM / STRATEGY



Deferred Gift

TOOL

A photograph of three women in a meeting. One woman on the left is wearing glasses and holding a blue pen. The woman in the middle is smiling and looking at a document. The woman on the right is leaning over and looking at a laptop. The scene is dimly lit with a blue tint.

# UNDERSTAND PHILANTHROPIC LANDSCAPE + POTENTIAL



# A UNIQUE MOMENT FOR PHILANTHROPY



WEALTH TRANSFER



PANDEMIC + ECONOMIC SHIFTS



DONOR SOPHISTICATION



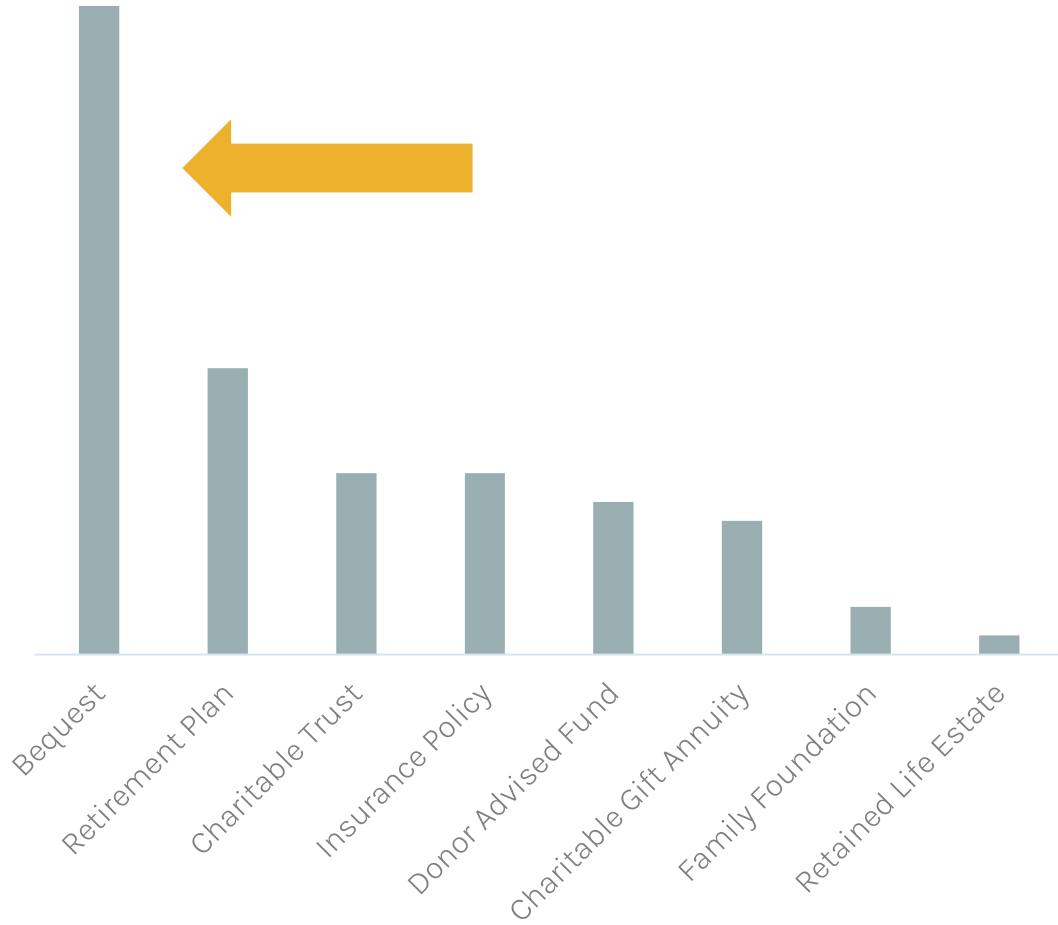
NONPROFIT SOPHISTICATION

# CCS PHILANTHROPIC LANDSCAPE 2022

## Gift Planning Takeaways

- 1 Area in Which Fundraising Staff Have the Lowest Levels of Expertise
- 2 Nonprofits Receive More Gifts From Donor-Advised Funds Despite Potential in Other Assets
- 3 More Than Half of Nonprofits Expect an Increase in Deferred Gifts in 2023

# BEQUESTS IN THE U.S.



\$484.8

Amount (in Billions) given to charity by Americans in 2021

\$46.01

Amount (in Billions) given through Bequests by Americans in 2021

\$13.71

Amount (in Billions) given through Bequests from estates of less than \$1 Million

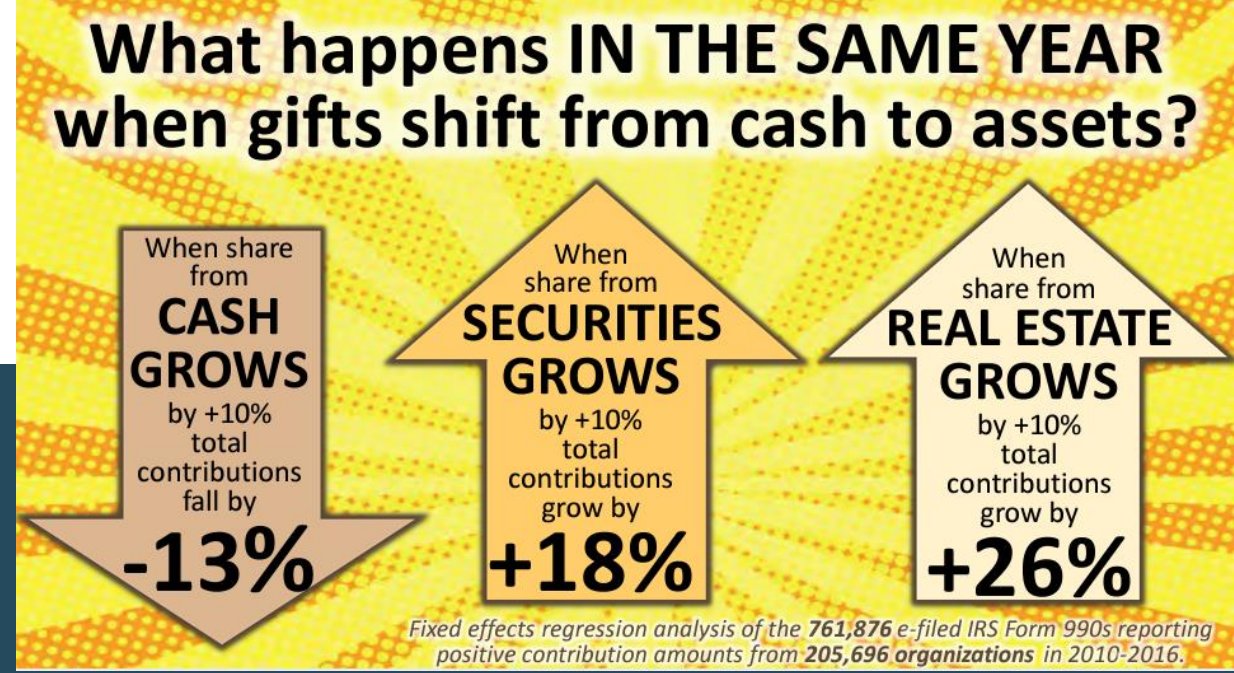
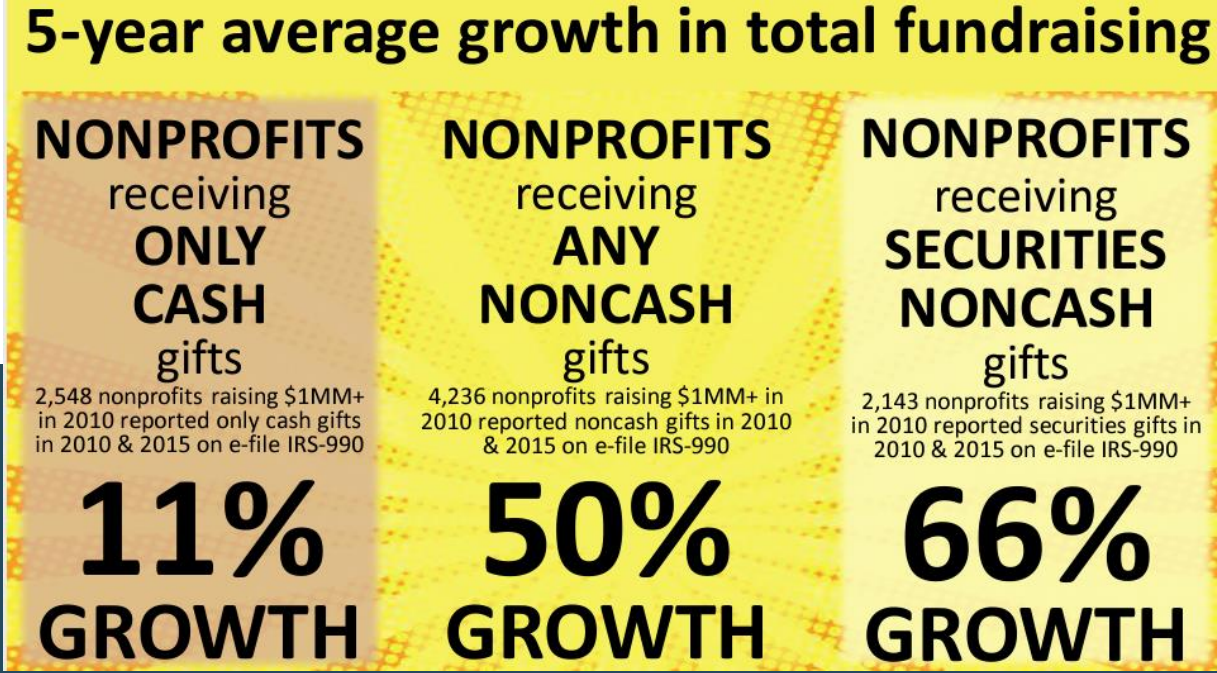
44

Average age donors make their Will

53

Average age donors added a charitable beneficiary to their Will

# NONCASH ASSETS DRIVE GROWTH



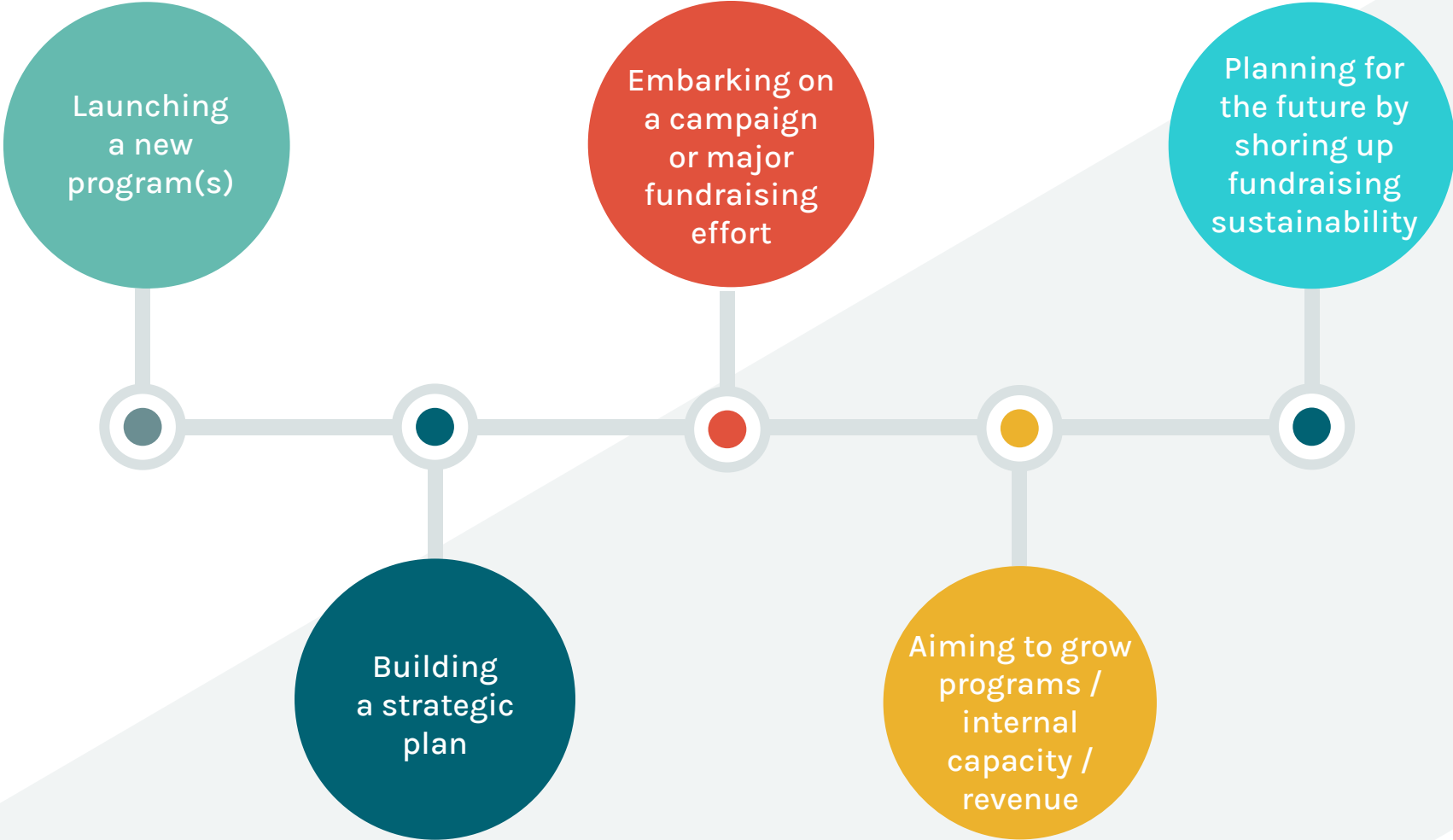
# TRIVIA BREAK

- 
1. DAFs
2. Residential Real Estate
3. Retirement Plans
- A. \$28 trillion
- B. \$39.4 trillion
- C. \$236 billion

A woman with dark hair pulled back, wearing a patterned top and a necklace, is smiling broadly and gesturing with both hands raised in a meeting. She is seated at a wooden table with papers and a pen. Other people are visible in the background, also seated at the table. The scene is lit with soft, natural light, creating a professional and collaborative atmosphere.

CHAT A PATH FORWARD

# WHEN TO DIVE DEEP



# KEY CONSIDERATIONS

- What capacity do I / does my organization have to take on an assessment?
- Who puts together your organization's annual development plan?
- How much time do I or my colleagues / does my organization have to do this work?
- Is my organization preparing to embark on a strategic plan? Can an assessment inform strategic planning work?
- Would it be appropriate to engage an external fundraising partner in assessing our fundraising efforts?





# CONFIRM YOUR PLANNED GIVING POTENTIAL

## DATA ANALYSIS

- Baseline Understanding of Fundraising
- Simple or Complex Approach
- Donor Segmentation

## TIMELINE & BENCHMARKS

- Organizational Goals
- Fundraising Plans
- 12 Month / 1-2 Years / 3+ Years

## DONOR ENGAGEMENT

- Marketing & Communications
- Stewardship - Legacy Societies

## RESOURCING

- Professional Development
- Advisor Network
- External Partnerships



MAKING THE CASE FOR (GREATER!)  
INVESTMENT

# WE CANNOT INVEST IN PLANNED GIVING BECAUSE...

... the need to prioritize annual and major gifts to get  
"dollars in the door."

# RESPONDING TO THE IMMEDIATE NEED

1

Highlight Noncash Assets That Are Cash in a Different Form

2

Annual Giving Increases

3

Major Giving Propensity Increases

# WE CANNOT INVEST IN PLANNED GIVING BECAUSE...

... our donor base is not old enough. They are not thinking of planned giving right now.

# RESPONDING TO THE 'IDEAL' DONOR

1

Share Findings from *Leaving a Legacy*

2

Know Your Donor Base – Who is Giving and When

3

Consider Life Stages as Opportunities to Have the Planned Giving Conversation

# WE CANNOT INVEST IN PLANNED GIVING BECAUSE...

... we don't have the internal expertise to manage  
planned giving.

# RESPONDING TO THE PERCEIVED EXPERTISE GAP

1

Invest in Your Philanthropic Advisors

2

Consider What Planned Giving Options You Can Focus On

3

Promote + Reward Collaboration



A close-up photograph of a person's hand holding a silver pen and writing on a white notebook. The background is blurred, showing another person's hand and a wooden surface. The overall tone is professional and focused.

RECAP

# PLANNED GIVING CAN DRIVE RESULTS

- 01 GROWTH:** Organizations pursuing gifts of assets beyond cash are growing.
- 02 SUSTAINABILITY:** Noncash assets create a sustainable revenue pipeline.
- 03 LARGER GIFTS:** Up to 90+% of wealth in the U.S. is in noncash assets.
- 04 EASIER GIFTS:** In a difficult or unstable economy, cash is kept close. Ask for noncash assets.
- 05 NEW MONEY:** Trillions in anticipated generational wealth transfer with the peak in 8-10 years.
- 06 FOR EVERYONE:** Gift planning culture democratizes philanthropy.
- 07 TRUE PARTNERSHIP:** Opportunity to partner with donors by helping to build their financial health for the benefit of your organization.

CCS | 75 YEARS  
FUNDRAISING



Thank You