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Planned Giving: True or False

1. Donors to my organization already know about endowments, bequests, and planned gifts.
 True False
2. Planned giving is too complicated for my organization to get involved. We are too small.
 True False
3. I have heard about planned giving but I am not an expert.
 True False
4. Planned giving should be separated from other fundraising and development.
 True False
5. Planned giving will “cannibalize” current giving and divert big gifts.
 True False
6. Only elderly widows or 85 year olds are good prospects for planned gifts.
 True False
7. Once we decide who will manage our endowment, like a money manager or a community foundation, “our work is done.”
 True False
8. Planned giving will solve all of our problems.
 True False
9. My organization doesn’t have the time or the resources to get a program started.

True False

1. Our donors already know about endowments, bequests, and planned giving.

False. Most do not. Donor surveys report that even those familiar with some planned gift ideas want to know more. Donors may not know YOUR ORGANIZATION is interested and may forget about you at the wrong time.

2. Planned giving is too complicated for my organization to get involved.

False. You only have to know the questions to ask. Here's one to start with, "Would you rather write a check or receive one?"

3. I've heard about planned giving but I'm not a planned giving expert.

False. You are an expert when it comes to YOUR organization. You know why your work is so important. With a bit more information and some coaching you can add planned giving options to your fundraising toolbox.

4. Planned giving should be separated from other fundraising and development.

False. It should be fully integrated into the development process.

5. Planned giving will "cannibalize" current giving and divert cash gifts.

False. Experience and research has proved that planned giving usually **increases current giving** and opens up new, bigger gift opportunities.

6. Only elderly widows or 85 year olds are good prospects for planned gifts.

False. Any committed donor or volunteer is a prospective planned giver.

7. Once we decide who will manage our endowment, like a money manager or a community foundation, "our work is done."

False. No one else can fundraise for you. People give to people. You and the members of your board can best represent the values and mission of your organization. You select a money manager for their skills at managing your present or future endowment so you and rest of the board can put your attention to where it matters most: building relationships and asking for gifts.

8. Planned giving will solve our financial problems.

False. Or, perhaps, True. Planned gifts and an endowment could help stabilize your organization's finances. However, it takes persistence and patience over time to build a successful program.

9. My organization does not have the time or the resources to get started.

True OR False. It's up to you.

Your Score _____ .