

***From Prospect to
Planned Gift:
A Strategic Approach to
Planned Giving Success***



AFP Nebraska August 2025 Meeting

University of Nebraska Foundation

- Trusted philanthropic partner of the University of Nebraska System
- Currently in a \$3B comprehensive campaign “Only in Nebraska”
- Planned Giving Team
- Success includes major gift fundraisers & a lot of collaboration

A simple question:

**HOW MANY DONOR
CONVERSATIONS BEFORE YOU
TALK PLANNED GIVING?**

A simple answer:

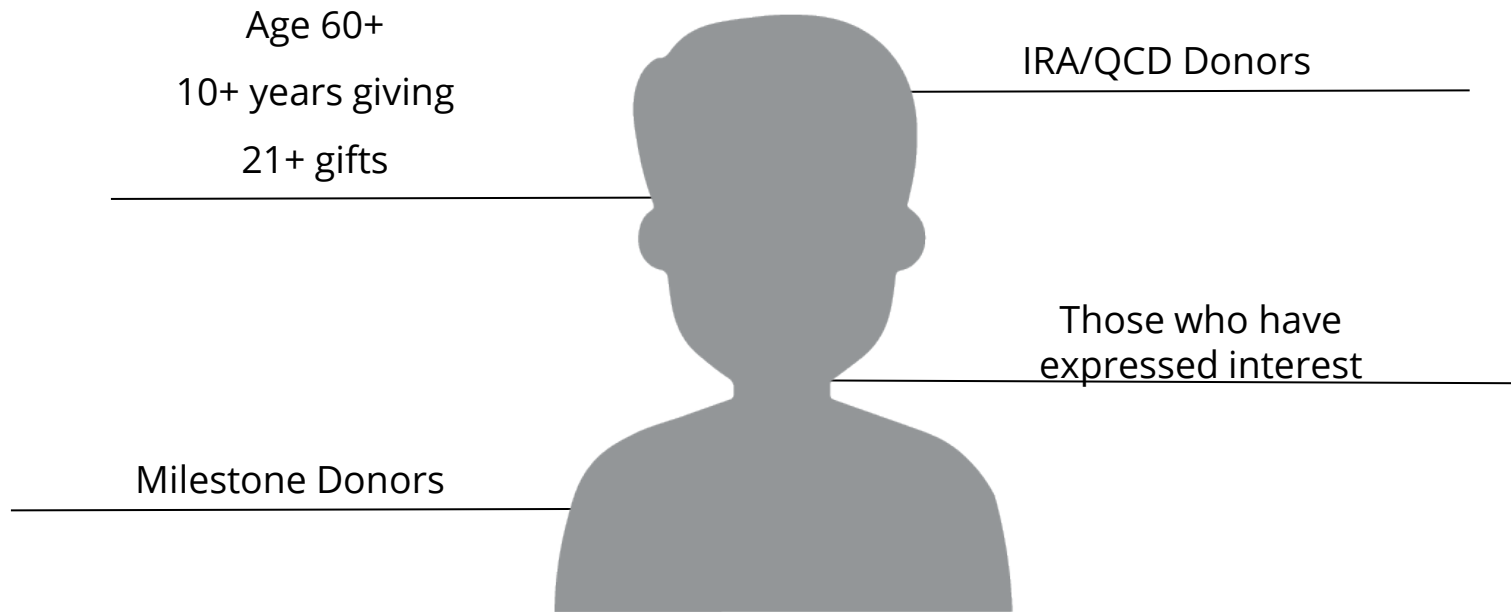
ONLY ONE!



"[Charitable bequests] are gifts from wealth, not disposable income. They're often 10x or 100x larger than a donor's annual giving"

DR. RUSSELL JAMES
TEXAS TECH UNIVERSITY

Who is a Planned Gift Prospect?



Planned Giving Prospect Outreach

A STRATEGIC APPROACH

- Polite Persistence
 - Average donors take 7 outreach attempts before booking a meeting
- Varied Outreach
 - Letter, Phone, Emails
- Consistency in asking "The Question"
 - Have you ever considered leaving a gift from your will or trust?
- Remember: No is a good answer!

They said yes! What next?

THE REALLY IMPORTANT STUFF

- Documentation, documentation, documentation
 - Organizational counting
 - Ensuring donor intentions
- Stewardship and recognition
 - Recognition societies
 - Saying thank you multiple ways
- The next ask
 - Blended gifts
 - Remember: annual giving statistically increases!

Speaking of Stewardship

- Remember: most PGs are *revocable*
- Minimum standard of care
- Personalized stewardship

Key Takeaways

Planned gifts are the largest gifts your donors will make – and you likely are already working with your best PG donors.

Strategic outreach and discussing planned giving early and often can make all the difference.

Smart stewardship is critical for long-term planned giving success.

Questions?

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