Esteemed Members Only: Your Website & Activity Tracking

PLANNED GIVING ACCELERATOR™

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Where We're Headed

- Navigating to PG on your website
- Planned Giving on your website
- Sample copy
- Activity tracking
- Board calendar
- Let's talk

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Navigating To Planned Giving On Your Website

- Under “Ways to Give” or similar
- Not under “Donate Now,” unless major surgery required

In decreasing order of appeal

- “Join our wills campaign!”
- “A gift in your will”
- “Join us/Invest in us for the long term”
- “Your long-term gift”
- “Long term giving”
- “Deferred gifts/giving”
- “Planned gifts/Planned Giving”

Got navigation ideas you want to talk about?

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Planned Giving On Your Website

- Not “Your Planned Giving Website”
- Simple
- Mission focused
- Bequest focused
- Mission picture/s
- Donor or couple picture
- Donor testimonial (short) or pull quote
- Avoid stock photos: Grandfather clock; will & pen; 70’s couple in lawyer’s office
- Avoid the calculators & encyclopedias

Sample Website Copy

It's easy for you to include Women's World Bank in your will. Your gift helps us unleash the power inherent in women, for decades and generations to come. We'll use your gift to support women's initiatives throughout the world.

When you visit your attorney to prepare or revise your will, ask them to use this wording:

I hereby give, devise and bequeath to <legal name>, with offices at <insert>, federal tax ID number <insert>, or its successors in interest, the sum of $ _____, (amount written out), exclusive of my lifetime giving, if any, for use in its most urgent priorities as determined by its Board of Trustees.

That paragraph is for a gift of a specific amount of money.

If you prefer to leave a percentage of your estate to WWB, use this:

I hereby give, devise and bequeath to <legal name>, with offices at <insert>, federal tax ID number <insert>, or its successors in interest, _____ % of all the rest, residue and remainder of my estate, for use in its most urgent priorities as determined by its Board of Trustees.

Of course, your attorney may change these suggestions to suit your preferences.

If you'd like to designate your gift to a specific program at WWB, it's best if you talk to us. We want to make sure your gift meets our future needs.

(continued)

Sample Website Copy

<When your recognition society is up> With your gift, we'll welcome you to our <recognition society>. You'll receive <insider info, invitations to special events, special surveys, etc.>. You'll always have our gratitude.

<If you have a bequest challenge> If you're one of the next XX people to include us in your will, when you let us know, you'll trigger an immediate gift of $YYY to us. That's thanks to the generosity of <your challenge donor, if you're allowed to use their name>.

For more information about including <your org> in your will, or other estate plan, please contact . . .. Getting your questions answered places you under no obligation to make a gift.

<Optional> This is not legal advice. We recommend you discuss your will, or other estate plan, with your attorney.

Activity Tracking In Your CRM Database

- Conversations
- Correspondence
- Solicitations
- Codes for PG attributes & actions
  - Attributes: Top prospect; Tier II prospect; member of recognition society
  - Actions: received a letter/email; checked a reply card box; replied to email; asked for info; attended event; said “no email”;
- Query friendly
- See Resource page in Members site

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Get On Your Board Calendar

- Brief your board in June
  - What Planned Giving is
  - What you're doing: activities, progress made, outcomes
- Solicit your board?

Esteemed Members

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