

INCREASE PLANNED GIVING VISIBILITY IN YOUR MARKET

Before you deliver a presentation, host an event, plan a board meeting, or meet with a donor...
"How can I incorporate a planned giving component?"

Correspondence

Gift Legacy Newsletter:

- Be sure to add your Board of Directors, key volunteers, and prospective donors to the "Gift Legacy" newsletter.

Letters/E-Mail:

- Add "Remember March of Dimes in your will" to your local market letterhead.
- Include a P.S. "Tag Line" in emails and letters:
 - P.S. A will is powerful...put March of Dimes in yours.
Visit <http://www.marchofdimes.org/giving/planned-giving.aspx> for more information.
 - P.S. Please remember to include March of Dimes in your will or trust.
Visit <http://www.marchofdimes.org/giving/planned-giving.aspx> for more information.
 - P.S. Create a legacy by leaving a bequest to March of Dimes
Visit <http://www.marchofdimes.org/giving/planned-giving.aspx> for more information.
 - P.S. Give a Fighting Chance to Every Baby. Remember March of Dimes in your will or trust.
Visit <http://www.marchofdimes.org/giving/planned-giving.aspx> for more information.

Already Planned Market E-Mails & Mailings:

- Include a Planned Giving Ad in your regularly scheduled Market newsletter.
- Add in a Planned Giving brochure or one pager with any already scheduled March of Dimes' supporter mailings.
- Be sure to highlight local supporters who have committed to planned giving as a spotlight in your already scheduled Market newsletter.

Events, Board Meetings, & Presentations

Materials and Contact Information:

- Display Planned Giving brochures at all events sponsored by March of Dimes.
- Include Planned Giving brochures in all event participant packets or handouts.
- Include the name and contact information of Planned Giving Director on printed materials and local market office staff listing.

Legacy Circle Recognition

- Have all Legacy Circle donors wear a lapel pin and be publicly recognized at all events or Board of Directors meetings.
- Present certificates to Legacy Circle donors at events or meetings soon after they commit.
- Host a small reception/gathering to thank Legacy Circle donors annually.
 - This can be used to invite prospects as well.

Presentations

- Include a Planned Giving moment at all Board of Directors meetings

Professional Advisor Outreach

Prospecting and Networking

- Consider adding local professional advisors (Attorneys, Trust Officers, etc) to your pipeline for prospective March of Dimes' supporters
- Develop bequest interest packets and have volunteers deliver to local professional advisor offices
- Keep local professional advisors on your event invitation lists

Partnering with March of Dimes' Planned Giving Director

Guest Speaker Opportunity

- Invite March of Dimes' Planned Giving Director to your next Board Meeting to speak about becoming a Legacy Circle donor.
- Invite March of Dimes' Planned Giving Director to your next fundraising event to network with donors to help prospect Legacy Circle donors.

Contact Information

Michael Welling, Director of Planned Giving and Endowment Development
916-576-2847 / mwelling@marchofdimes.org