



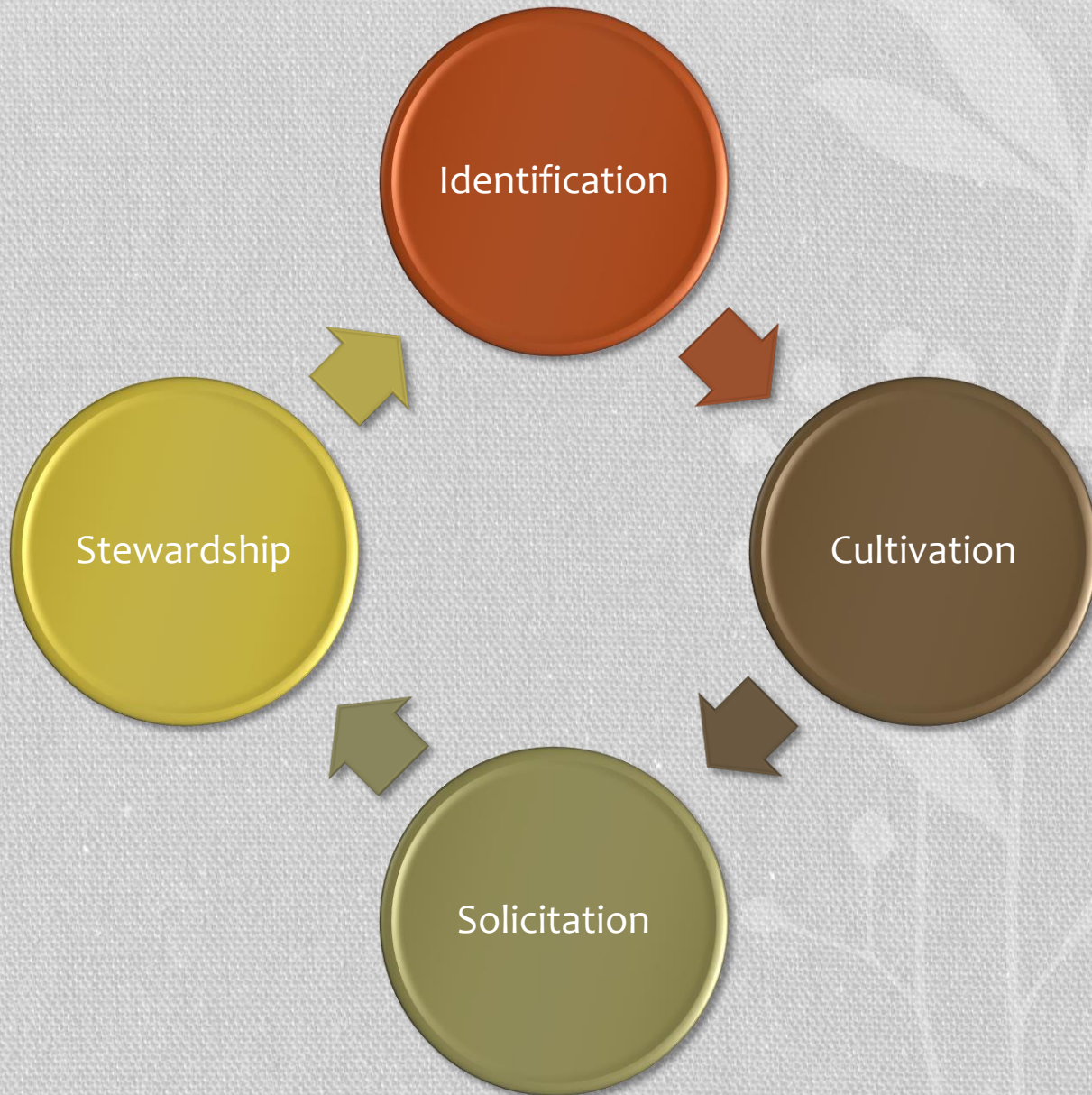
# FRIENDS FOR LIFE: STEWARDED PLANNED GIFTS

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# Learning Objectives

- Stewarding planned gifts
- Working with new & existing donors
- Maintaining planned gift records
- Review & discussion of case studies



# Planned Giving Stewardship

- Decades-long process
- Likelihood of gift realization during your tenure = low
- Requires a well-documented plan



# Stewardship of new donors

- Proper documentation
- Prompt & ongoing thanks
- Annual visits (where feasible)
- Ongoing communication
- Volunteer engagement



# Stewardship of existing donors

- Assess the landscape
- Visits & documentation
- Maintain communication
- Treat them like a new donor



# Record Keeping

- Which documents will you use?
- Where & how will you store them?
- Who can access the files?
- How else will you document the relationship?



# Case Study #1

A same-sex couple who has left your organization in their estate notifies you that they plan to change their estate and remove your organization. This is upon learning that your organization will oppose a court ruling on same-sex marriage.

- How would you react to the donor?
- What steps could you take to mitigate the loss of the planned gift?
- How would you handle the media attention if the gift is ultimately lost?



# Case Study #2

A member of your faculty makes sexist comments about women and science at a conference, and the public outcry that follows forces his resignation from the school. One of your planned gift donors is upset and threatens to remove a bequest to the school from his estate unless the professor is reinstated or issued an apology.

- How would you react to the donor?
- What steps could you take to mitigate the loss of the planned gift?
- How would you handle the media attention if the gift is ultimately lost?





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