

6. Marketing

Marketing to encourage legacy gifts is like Israel's drip irrigation system...drip by drip the donor sees the message and when the time is right, they make the commitment. Perpetually marketing legacy giving to your constituents will normalize legacy giving and offers donors another common way to have an impact. To make these efforts sustainable, it is important to integrate the concept of legacy giving into all fundraising materials and events.

To craft your Marketing Plan, consider these methods:

- Communication Devices
 - Facility – posters, banners, flyers, table tops, donor listing or wall, brochure...
 - Meetings / Events – announcements, materials, name tags...
 - Electronic – Display boards, website, social media, email, e-blasts...
 - Mailings – pledge reminders, year-end tax statements, stationery, direct mail letters...
 - Newsletter – ad, donor testimonial/story, listing, topical article, photos...
- Organization calendar
 - Large Events – event booklet, poster, announcements, ribbons, tent cards, brochure, ads
 - Holiday programming – announcements, flyers, ribbons, poster/banner...
 - Meetings/Classes – group presentation, announcements, brochure, banner, tent cards...
 - Shabbat Services – announcements, brochures, ribbons...
- Fundraising
 - Annual Fund letter – check box or ask them to contact if:
 - “I have already included (your organization) with a gift in my will, trust, retirement account, or life insurance policy”
 - “I’d like to be remembered forever, please contact me regarding a gift in my will, trust, retirement account or life insurance policy”
 - “I’d like to be remembered forever, please contact me to discuss a legacy gift”
 - High Holidays – Materials on seats or around facility, remarks from champion, bookmark, appeal cards with fold-down tab for legacy commitment.
 - Personal conversations – blended/integrated ask.
 - Events – brochures, flyers, tent cards, ask, ad in tribute book, announcement.

Remember to use donor listings, donor testimonials and impact stories to market legacy giving

Use the table to outline how your organization will continue to weave legacy giving into your marketing efforts

Culture of Philanthropy Tip:

Donors are contacted regularly with invitations to participate in activities, progress updates, and information about how their annual contributions are making a difference and the impact their legacy gifts will have.