

Key Planned Giving Research Insights

Key Statistics

- Donors who name an estate gift show a **75% increase in yearly giving**¹
- 70-80% of Americans engage in charitable giving², but less than 6% leave charitable bequests at death³, suggesting a **big opportunity for cultivation**
- **Charitable plans created earlier in life result in larger gifts** as compared to end of life plans⁴
- About half of the typical inheritance is **spent within 12 months**⁵

Effective Planned Giving Phrases

- Use **“will planning”** rather than **“estate planning”**⁶
- Use **“a gift to charity in your will”** rather than **“bequest”**, **“leave a legacy”**, or **“remember your favorite charities”**⁷
- Use **“to support causes that have been in important in your/their life/lives”**⁷
- Begin requests with **“honor a friend or family member”**⁸
- Mention **“tax deductions”** and use **tax avoidance** language⁹
- Avoid **“death”** and related imagery⁷
- Avoid formal terms such as **“Charitable Remainder Trust”**, **“Charitable Gift Annuity”**, and **“Remainder Interest Deed”**⁶

Effective Planned Giving Strategies

- Use **living donor stories** rather than **deceased donor stories**¹⁰
- Tell **life stories of donors whose giving will last beyond their lifetime** and emphasize **the lasting impact of gifts**¹⁰
- Use social norms such as **charitable bequests from other members of your community**¹¹
- Use **example donors** rather than **what “you” would do**
- Use **images of donors that are of similar age to your target audience**
- Use **default settings and opt-out design to gently encourage donations**
- Approach planned giving conversations **obliquely**, in the context of another topic
- Use **tribute gift requests**, which can connect friends & family to causes¹²
- Tribute gift requests are most effective when **given in honor of ascendant females (mother, aunt, grandmother, etc.)**

Sources

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5. Zagorsky, J. L. (2012). Do People Save or Spend Their Inheritances? Understanding What Happens to Inherited Wealth.
6. James, R. N., III (2014). Experimental Test of Charitable Financials Planning Phrases.
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12. Routley, C. (2011). Leaving a charitable legacy: social influence, the self and symbolic immortality.