Key Planned Giving Research Insights

Key Statistics

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

Effective Planned Giving Phrases

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

Effective Planned Giving Strategies

- Use living donor stories rather than deceased donor stories.
- Tell life stories of donors whose giving will last beyond their lifetime and emphasize the lasting impact of gifts.
- Use social norms such as charitable bequests from other members of your community.
- 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 causes.
- Tribute gift requests are most effective when given in honor of ascendant females (mother, aunt, grandmother, etc.).
1. Analysis by Dr. Russell James from the National Health and Retirement Study (HRS) which is sponsored by the National Institute on Aging and administered by the University of Michigan.


10. James, R. N., III (2016). We the living: effects of living and deceased donor stories on charitable bequest giving intentions.
