

Making the Case for **INVESTING** in a PLANNED GIVING PROGRAM

FORMULA FOR CALCULATING ROI

- Total Number of active donors in the last 7-10 years
- 20% should fall into the category of loyal donors
- 30% of your loyal donors will most likely be open to a conversation about Planned Giving
- Of those you speak with, 30% should make a commitment
- The national average bequest is \$50,000

Example

Active donors in the last 7-10 years	2,500 active donors
20% should fall in the category of loyal donors	500 loyal donors
30% of your loyal donors will most likely be open to a conversation about PG	150 conversations
Of those you speak with, 30% should make a commitment	45 planned gifts
The national average bequest is \$50,000 (45 x \$50,000)	\$2,250,000

Enter in your # of Active Donors and tab thru the fields to unlock your potential

Planned Giving Program Potential

Potential for 2,500 active donors = \$2,250,000

Bonus

Studies show once someone becomes a planned giving donor their annual fund contributions will double. To calculate take your average annual fund gift amount and multiply by the number of planned giving donors.

For **ideas** to get your planned giving programs to the **next level**

call Joe Tumolo at 610.653.7906 or

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Joe Tumolo | Planned Giving Program Development
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