

Can Planned Giving Help Calm Concerned Donors?

- I. **Should we be talking about gift planning in this environment?**
 - A. Yes! Our donors need to feel some normalcy right now.
 - B. Yes! There are donors who are concerned about cash flow.
 - C. Yes! Donors are still going to want to know if there is a way to stay connected as a donor, without cutting into their disposable income, (limited now or not!).
 - D. Remember, educating donors on ALL the aspects of gift planning is even more important than ever.

- II. **Should we be talking to donors about their planned gifts that are already in existence?**
 - A. Yes! Donors who do have vehicles that make distributions can use that distribution to contribute to you now.
 - B. Yes! If you have a CGA donor whose contract is now cutting into your assets, now is the time to talk to them about terminating their income interest.
 - C. Yes! Particularly donors who have created a Donor Fund in conjunction with their CRUT.

- III. **Is there a specific way to start this conversation?**
 - A. Talk to your donor, just as you discuss any topic during a meeting;
 - ✓ If they mention wanting to continue gifting but...
 - ✓ If they ask if there are other ways to get involved
 - ✓ If they mention concerns over cash flow...

- IV. **What if the donor belongs to a colleague?**
 - A. Work as a Team, support your colleague's relationship by acting as a resource. Donors appreciate teamwork, particularly when they benefit from the collaboration.