



20 Factoids about Planned Giving:

This list of “20 Factoids about Planned Giving” has been drawn from the book *Donor-Centered Planned Gift Marketing* (Wiley, Oct. 2010) by Michael J. Rosen, CFRE. For more information or to order your copy, visit www.mlinnovations.com/books.

1. Bequests are the most common form of planned gift.
2. Almost everyone has the ability to make a planned gift.
3. Bequests are the major gift of the middle class.
4. The average age of someone who makes their first charitable bequest commitment is 40-50.
5. Women are more likely than men to use complex gift planning tools.
6. Women are more likely to give a bequest to religious, health, human services, and environmental organizations than men.
7. Those without children are far more likely to make a planned gift.
8. Only 5.3% of those over 50 have made a charitable bequest commitment.
9. 33% of Americans are willing to consider a charitable bequest.
10. 5% of Americans are willing to consider a CRT.

11. Once donors name a charity in their will, they almost never remove it.
12. Only 37% of those over 30 are familiar with the term “planned giving.”
13. Among those over 30, only 22% say they have been asked for a planned gift.
14. Real donor stories work much better than fictional, composite stories.
15. For ads and letters to those over 40, a large font is needed to get them read.
16. Using a challenge grant for a planned gift appeal can create urgency.
17. Donors give to things or causes that are important to them, not for the benefits.
18. The best source for information about a prospect is the prospect.
19. Tax avoidance is NOT a powerful motivator for planned giving.
20. Organizations will not usually get the gift unless they ask for it. So, ask!