

Planned Giving

Planned giving programs play an important role in charitable fundraising.

Introduction

Planned giving is charitable giving that is deferred to sometime in the future (often at death) and is formally integrated into a person's overall financial and estate planning. Planned giving methods range from straightforward [bequests](#) to more complex mechanisms such as charitable gift annuities, charitable trusts, and pooled income funds; many offer tax or other financial benefits to donors, and are therefore appealing to people who plan to make large gifts.

This guide provides links to resources to help nonprofits understand planned giving and operate successful planned giving programs. See the [Planned Giving](#) library topic at the WeConservePA Library for these and other resources.

Understanding Planned Giving

[A Complete Guide to Planned Gifts for Nonprofits](#)

[What Is Planned Giving?](#)

[10 Things You Might Not Know About Planned Giving](#)

[Four Common Planned Giving Myths Busted](#)

[Planned giving Fact Sheet](#)

[Donation by Will: Options and Issues Regarding Gifts of Cash, Land, and Other Property](#)

Operating a Planned Giving Program

[How a Nonprofit Can Start and Market a Planned Giving Program](#)

[You Can't Take it with You: Big Gifts for the Future](#)

[How to Launch Planned Giving at Your Nonprofit](#)

[10 Steps to Developing a Planned Giving Program](#)



[Checklist for Planned Giving: What Tools Do You Really Need?](#)

[Establishing a Planned Giving Program](#)

Identifying and Cultivating Donors

[The Best Ways to Identify a Planned Giving Prospect for Your Nonprofit](#)

[How to Talk with Donors About Planned Gifts](#)

[How to Find Planned Giving Prospects: 4 Steps](#)

[Finding Your Best Planned Giving Prospects](#)

[Prospect Research for Planned Giving: 5 Fundamental Steps](#)

Examples of Land Trust Planned Giving Programs

Many land trusts have planned giving programs. See the websites of the organizations listed below to get a sense of how different organizations structure and market their planned giving programs.

[Deschutes Land Trust](#)

[Estes Valley Land Trust](#) (Forever Estes Circle)

[French & Pickering Creeks Conservation Trust](#)

[Minnesota Land Trust](#)

[Natural Lands](#)

[North Branch Land Trust](#)

[Sonoma Land Trust](#)

[The Trust for Public Land](#)



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