

# Planned Giving MENTOR™

◆ The Newsletter for Newcomers to Gift Planning ◆

Volume II, Number 1

January 2004

## Training Talk

You've just been hired for a development job, but this one has a new twist. You're also responsible for planned giving!

You've attended a planned giving conference recently, and you've helped a couple of people create life-income arrangements over the years as well. However, you're far from proficient in the more technical aspects of planned giving, and marketing planned giving is something you've never thought about. One-third of your performance will be measured on PG production — so the “rubber really needs to meet the road” in this area of your work life!

### NCPG Training

There are a myriad of training sessions on the more technical aspects of planned giving. The National Committee on Planned Giving (NCPG) has a conference each year. NCPG also has a library of resources you can buy as you get “up to speed” on the basic elements of planned giving. Check out the organization's Web site for details at [www.ncpg.org](http://www.ncpg.org).

NCPG also has 118 local chapters, many of which hold their own monthly, quarterly and sometimes annual training sessions. Further, many have developed effective mentoring programs where newcomers can be linked up with seasoned professionals.

There's an NCPG chat room called “Gift PL” where PG professionals regularly go to ask questions, get answers and just visit with others about the experiences they're having. There's another “room” at Yahoo called [plannedgiving@yahoo.com](mailto:plannedgiving@yahoo.com).

### Other Training Sources

Software vendors also have training sessions. These sessions can be especially useful because you'll learn the more technical aspects of planned giving while at the same time learning to use your software in creating illustrations for your PG prospects.

The “paper companies” provide a host of resource material to the PG community as well. Newsletters, pocket pamphlets, marketing strategies, consulting services and so forth are all part of what they do. Ask people in your local NCPG chapter which company they have used (and liked) and then check out its Web site. These companies frequently hold training sessions of their own.

*Most new PGOs  
assume they must get  
technical training quickly.*

And finally, don't forget *The PGT Marketplace!* It provides a fairly comprehensive list of training sessions around the country. It comes regularly with your subscription to *PGMentor*, so check it out for training opportunities in your area.

### Focus on Marketing

In my experience, most people who are new to planned giving assume they must get technical training quickly. However, the planned giving world has become full of technically competent professionals who are delighted to help you work through the technical issues associated with a PG arrangement(s).

However, planned giving officers still have a long way to go in terms of learning how to market planned gifts effectively. My encouragement to newcomers is to look carefully at organizations where the PG officer has worked for many years and where the PG donor base is growing. Spend a couple of hours visiting with that person. Who knows, maybe he or she could become your PG mentor!

Two hours learning the “ins and outs” of successful PG marketing can be worth two years of technical training when it comes to true success in planned giving.

— Gene Christian

## Software and Web Sites

The introduction and growth of computers and the Internet is making significant contributions to planned giving. Before software was introduced in the early 1980s, planned giving officers (PGO) performed all of their calculations by hand, using reference manuals, actuarial tables, forms and calculators. On average, it might have taken 60-90 minutes just to compute the value of the income tax deduction for a charitable remainder unitrust.

That has all changed. Software is easy to use, readily available, and has made it possible for the PGO to provide increased economic data such as cash flow projections. Thanks to the speed of computers, a gift proposal can be generated in minutes. This enables the PGO to prepare several calculations, which a prospect can compare, and to spend more time on the important task of donor cultivation.

### PGMentor Topics: A Two-Year Glance

- 1 The Face of Planned Giving
- 2 Getting Started in Planned Giving
- 3 The Home Team
- ▶ 4 Resources for PGOs
- 5 When a Gift is a Gift
- 6 Focus on Bequests
- 7 Introduction to Marketing
- 8 Relationships Count
- 9 Policies and Procedures
- 10 Keeping Good Records
- 11 Tax Matters
- 12 Planned Giving Ethics 101
- 13 Identify Your Prospects
- 14 Understanding Your Prospects
- 15 How to Conduct a Visit
- 16 Celebrating the Gift
- 17 Things People Give
- 18 What's a Gift Worth?
- 19 Creating Artesian Wells
- 20 Gift Annuities
- 21 Charitable Trusts
- 22 Less Common Planned Gifts
- 23 Working With Advisors
- 24 Stewarding the Gift

To order back issues, call 800-525-5748