

- Professional on-call planned giving support whenever and wherever needed: *regardless of number of hours spent on client's needs, a consultant is available to our customers.*
- Planned giving program start-up, assessment, and improvement: *we provide an objection assessment of program and strategies to take program from where is it to a new level of increased income*
- Integration of planned giving into overall development program: *maximize effectiveness of planned giving program and revenue from annual and major donors requiring integrating it into your entire development effort.*
- Planned giving training for board members, development officers, and key shareholders: *key shareholders are the gateway to planned gifts...training key individuals to recognize scenarios and opportunities for planned gifts when meeting with prospective donors is vital.*
- Presentations and seminars for key constituent groups: *we provide education and public visibility to as many donors and prospects as possible educating and motivating them to make a planned gift.*
- Marketing plan customized for organization: *every organization is different and requires a plan that is unique to them and their donors.*
- Recognition and stewardship program for planned giving donors: *consistent stewardship is vital to strengthening relationships and encouraging repeat gifts*
- Print visibility materials--ads, articles, newsletter, receipts, etc. *consistent print visibility provides continuous education and awareness for individuals who regularly support an organization to consider a planned gift.*
- Planned giving illustrations and proposals: *technical expertise in developing and presenting easy to understand planned giving techniques and the personal benefits to the specific donor.*
- Confidential joint donor visits and follow-up: *A collaborative visit with development officer, who is the gateway to donors for planned gifts, is most effective way to secure the planned gift.*
- Planned gift acceptance policies and administration: *expertise in developing appropriate policies and procedures for a well run planned giving program.*
- Technical support and guidance: *expertise in the technical and tax aspects of all planned giving techniques*
- Planned gift valuation: *expertise the valuation and counting of planned gifts.*
- Planned gift trustee, legal, investment referrals: *network of allied advisors to whom organizations and/or donors can utilize in the review, preparation and administrative of planned gifts*
- Planned gift investment recommendations: *advisory to investment or finance committee as to appropriateness of investments for planned gifts vehicles*