



The Occhipinti Group

SERVICES FOR CHARITABLE NON-PROFIT ORGANIZATIONS

Adopting a planned giving program that is a strategic, consistent, and integrated part of your development strategy will dramatically increase the volume of planned gifts your charity receives and strengthen your ability to carry out your mission. We offer the following array of services to help you take your planned giving program to the next level.

- Planned giving program assessment, start-up, and improvement: *An objective assessment of your program and recommended strategies to take your program from where is it to a new level of increased results.*
- Integration of your planned giving into overall development program: *Maximizing the effectiveness of a planned giving program and revenue from annual and major donors requires strategies and training to integrate it into your entire development effort.*
- Planned giving training for your board members, development officers, and key shareholders: *Key shareholders are the gateway to planned gifts and training them how to recognize scenarios and opportunities for planned gifts when meeting with prospective donors is vital.*
- Planned giving marketing plan customized for your organization: *Every organization is different and requires a plan that is unique to them and their donors.*
- Recognition and stewardship program for your planned giving donors: *Consistent stewardship is vital to strengthening relationships and encouraging repeat gifts.*
- Planned gift acceptance policies and administration for your organization: *Developing appropriate policies and procedures are foundational for a well run planned giving program.*
- 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.*
- Presentations and seminars for your key constituent groups: *Educational presentations to donors and prospects both raises the public visibility of your planned giving program and provides opportunities for motivating them to make 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: *Collaborative visits with development officers is one the most effective ways to secure planned gifts.*
- Technical support and guidance: *We provide expertise in the technical and tax aspects of all planned giving techniques.*
- Planned gift valuation: *We provide expertise in the valuation and counting of planned gifts.*
- Planned gift trustee, legal, investment, and other professional service referrals: *We have a network of allied advisors whom organizations and donors can utilize in the review, preparation, and administrative of planned gifts.*
- Planned gift investment recommendations: *We can provide advisory services to your investment or finance committee as to appropriateness of investments for planned gifts vehicles.*
- Professional on-call planned giving support whenever and wherever needed: *Regardless of number of hours spent on your needs, a consultant is available to you when you need him or her.*