

A photograph of two young children, a boy and a girl, sitting at a table and playing with colorful geometric blocks. The boy is on the left, smiling, and the girl is on the right, also smiling. They are surrounded by various shapes like triangles, squares, and rectangles in different colors. The background is slightly blurred, showing other children in a classroom setting.

# BUILDING BLOCKS OF A LEGACY GIVING PROGRAM

UNLOCKING THE POWER OF A LOVING LEGACY



# Today's Team



**Kristi Posewitz**  
**TPF**  
Director of Marketing

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**TPF**  
Relationship Manager

# Agenda

1. **Why Now?**
2. **Getting Started**
3. **Program Materials**
4. **Digital Tools**
5. **Hosting Events**
6. **Maintenance**





**WHY FOCUS ON THIS NOW?**



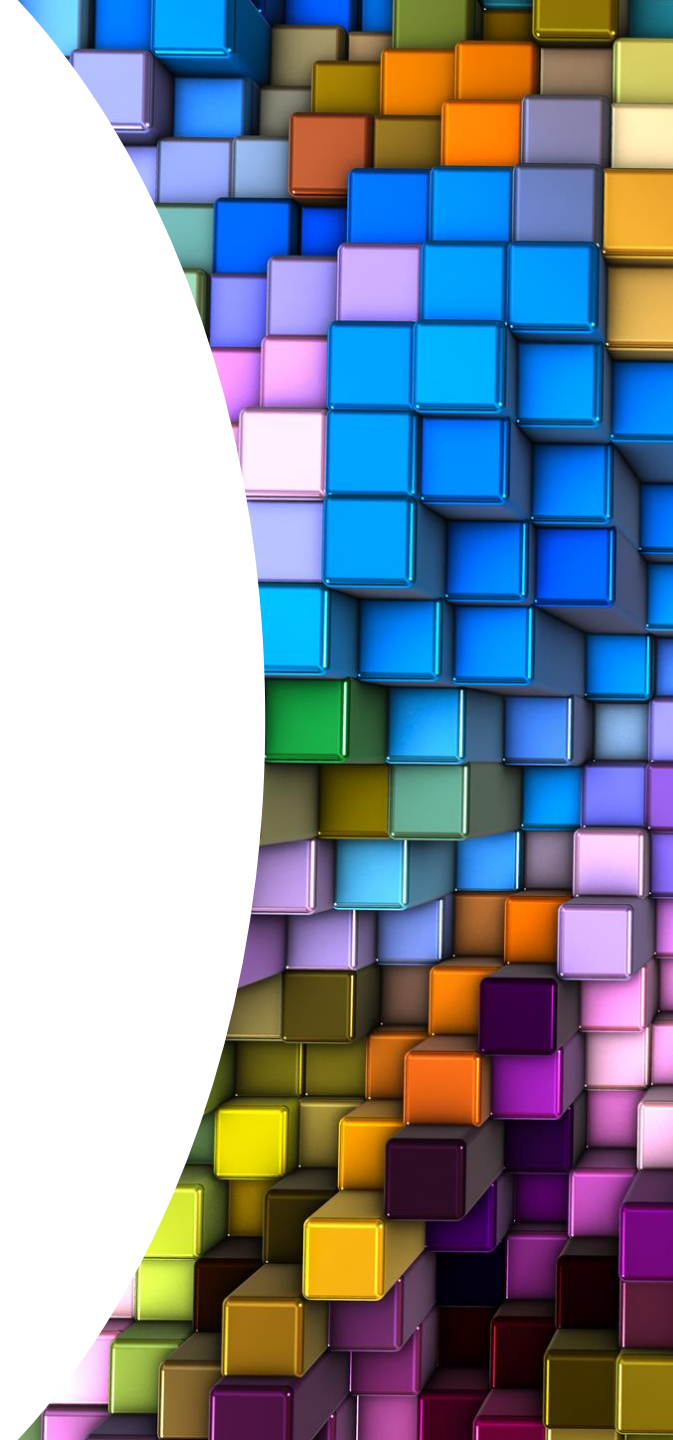
- **\$31 trillion wealth transfer by 2033.**
- **750,000 individuals with net worth of \$5 million or more to transfer wealth by 2035.**
- **Average age of individuals transferring wealth is 79-80.**
- **Most popular interest of donors are sports and philanthropy.**



# 1. Why Now?

# Basics and Benefits

- **What is legacy giving?**
- **Broaden your fundraising efforts**
- **Extend your mission**



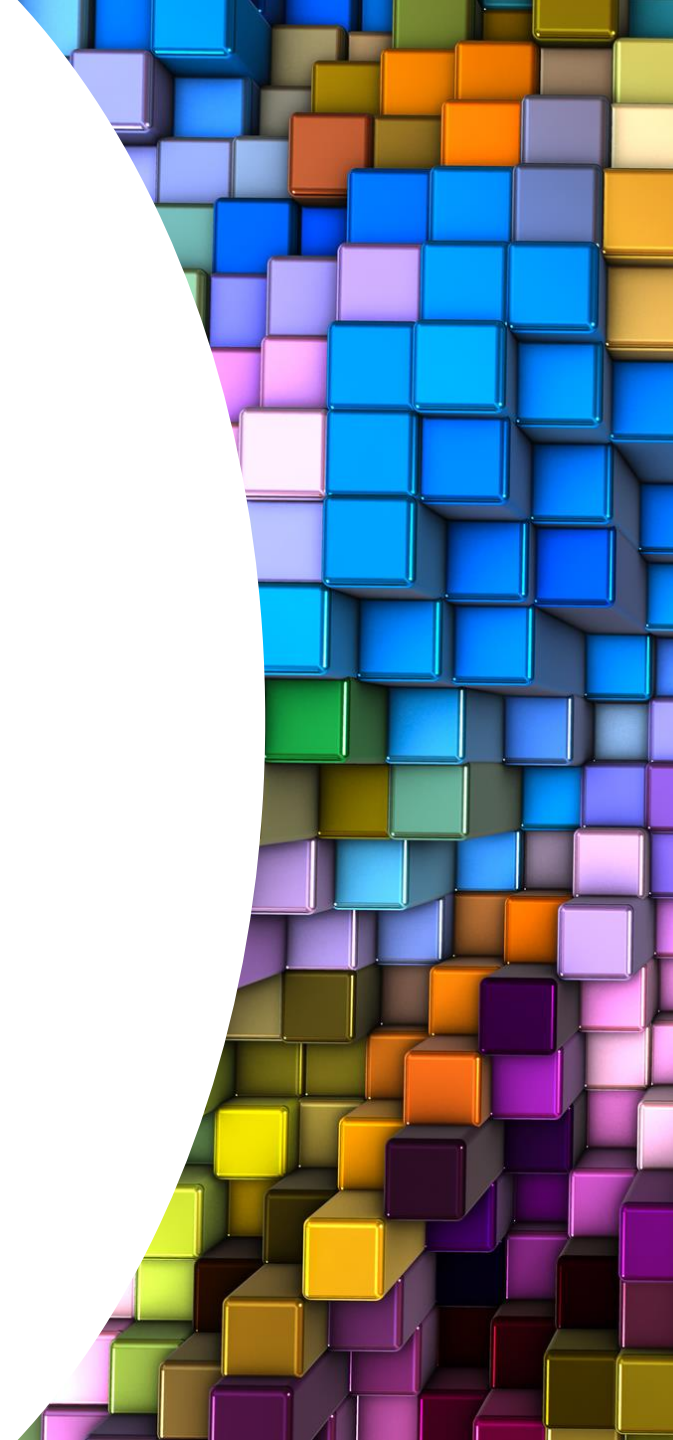
# 2. Getting Started





# Focus on Awareness and Purpose

1. Outline your goals
2. Define your audience
3. Determine your communication channels
4. Create a communications calendar
5. Develop a budget
6. Document, share, and track progress



A close-up photograph of a child's hands playing with colorful building blocks on a green carpet. The child is wearing a red and white patterned sweater. The blocks are in various colors including blue, green, yellow, and red. The text "3. Program Materials" is overlaid in a bold, dark blue font across the center of the image.

# 3. Program Materials

# Your Message Matters!

- Explain the importance of giving.
- Outline the benefits.
- Show the impact.
- Include a call to action.





# Marketing Fundamentals

1

Create a generosity phrase.

3

Design a brochure or flyer.

2

Write a donor letter.

4

Develop a giving landing page.



A close-up, shallow depth-of-field photograph of a person's hands typing on a silver laptop keyboard. The hands are positioned in the lower right quadrant, with the left hand slightly behind the right. The person is wearing a silver ring on the ring finger of the right hand and a thin gold band on the ring finger of the left hand. The laptop is open on a wooden desk. The background is softly blurred, showing a white surface and a glass of amber liquid. A semi-transparent white horizontal band is overlaid across the middle of the image, containing the text '4. Digital Tools' in a dark purple, bold, serif font.

# 4. Digital Tools



# **Activate and Connect in the Digital World**

- 1. Dedicated landing page**
- 2. Social Media**
- 3. Email**
- 4. Text**
- 5. Blogs**



# 5. Hosting Events

# Plan and Execute Inspiring Events

1. Identify and align a leadership team.
2. Define clear and achievable goals.
3. Outline a detailed budget.
4. Effectively execute the event.
5. Provide easy-to-use donation vehicles.
6. Focus on gratitude and follow up.







# 6. Program Maintenance



# Track and Manage Program Performance

1

Annual reviews

2

Quarterly reports

3

Monthly milestones





# Create New Opportunities that Inspire Giving

- Start a birthday fund
- Designate a day of service
- Incorporate Legacy Sunday
- Form a Legacy Society
- Hold an annual Legacy Reception
- Use a moment for mission
- Implement 500 in 5 years



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[www.tpflegacybuilder.org](http://www.tpflegacybuilder.org)



**THANK  
YOU!**



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