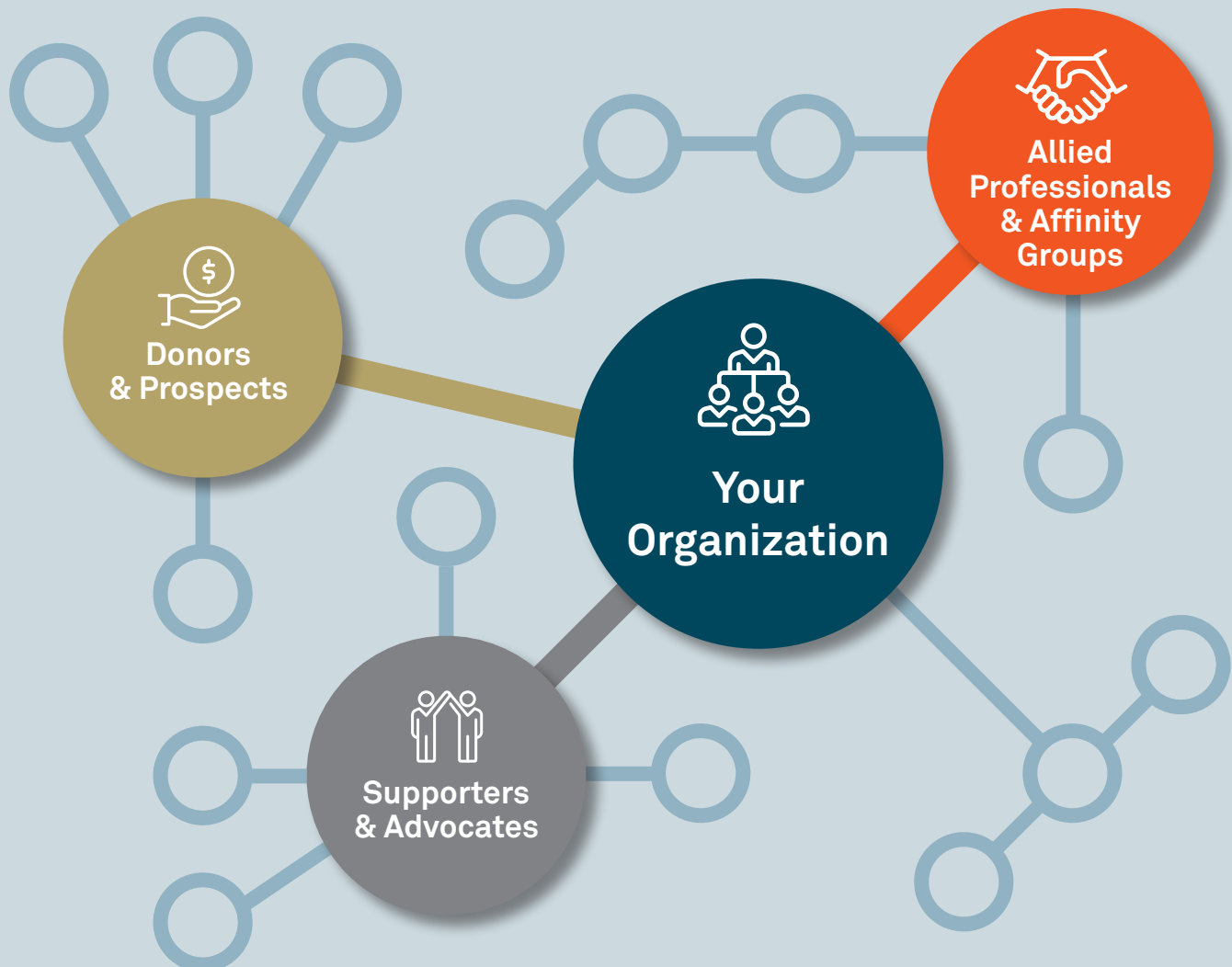Successful Planned Giving:

Building a Network

Enhancing Donor Engagement, Board Development and Advisor Networks

A successful planned giving program requires building the right team and developing effective policies and procedures for gift acceptance and administration. Another important key to long-term success is developing and maintaining a broad network of individuals and resources that can help you bring continued awareness to your program. Here's an outline to help you build an effective network.

Three Key Networks:

Allied Professionals & Affinity Groups

Donors & Prospects

Your Organization

Supporters & Advocates

Donors and Prospects

Engage your pool of current and prospective donors and develop a stewardship strategy through:

- Dynamic, multi-level prospect research
- A comprehensive, multi-channel marketing plan
- Strategic events

Pro Tip Host an annual luncheon for donors and prospects focused on a timely educational topic.

Supporters and Advocates

One of easiest and most effective ways to share your message is to engage people who are already active supporters of your mission, including:

- **Past donors and Legacy Society** – Members can tell their personal giving stories and provide referrals for potential new donors
- **Advisors** – Centers of influence, such as attorneys, accountants, wealth and financial advisors with community ties can connect you to their networks
- **Volunteers** – Active volunteers can provide a first-hand perspective of your mission in action

Pro Tip Use a donor or volunteer testimonial in your marketing material.

Allied Professionals and Affinity Groups

In an everchanging philanthropic environment, it's important to stay connected to the individuals, organizations and trends that can provide opportunities for educational growth, support and development of your program. They can also provide administrative and investment expertise. Connect with:

- National associations and local councils for education and training sessions, conferences and networking
- Internal and external stakeholders, including board members, other gift officers and volunteers
- Vendors and service providers to gain insights and expertise

Pro Tip Challenge your board members to participate in the stewardship of key donors and prospects.

About BNY Mellon Wealth Management Planned Giving

BNY Mellon Wealth Management Planned Giving can help advise you on strategies to manage and grow your planned giving programs. For over 30 years, we have served nonprofit organizations with comprehensive gift management, tailored investment management solutions, and donor and organizational support. We understand the motivations of donors and the complex philanthropic and estate planning approaches used to preserve wealth while giving back to the community.

Leveraging these insights and the broad resources of BNY Mellon, our clients benefit from the deep and broad resources of BNY Mellon Wealth Management, a leading wealth manager with more than two centuries of experience serving financially successful individuals and families, their family offices and business enterprises, planned giving programs, and endowments and foundations.

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