

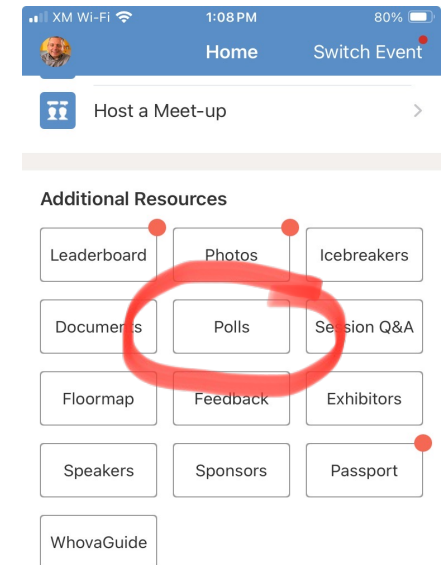
Welcome! We're glad you're here.

From friends TO FAMILY

Creating a planned giving pipeline



Please go to your
Whova app and
complete the two
polls associated with
this session



From friends TO FAMILY

Creating a planned giving pipeline



Let's get to know each other!

Who's poll results....

On a scale of 1-10 how familiar are you with planned giving?
1 = a total newbie
10 = a planned giving pro!

In the past 24 months has the ministry you serve received an end-of-life gift?

Is planned giving your primary full-time responsibility or one thing you do among many?



DOUG BOUWS

**VP of Client Services
Money for Ministry**



TERRY BIESBOER

**Chief Development Officer,
Major & Planned Gifts
Lutheran Hour Ministries**



**Planned giving doesn't need to be scary!
It can be fun and you CAN do it!**

Dorothy!



It's not as hard as you first thought...

1. 85-90% of planned giving is the simple gift in the will.
2. People assume Planned Giving is for the wealthy
...only
3. Under the radar – “hidden major donors.”

Mule Riders!



The 12-12-12 Model

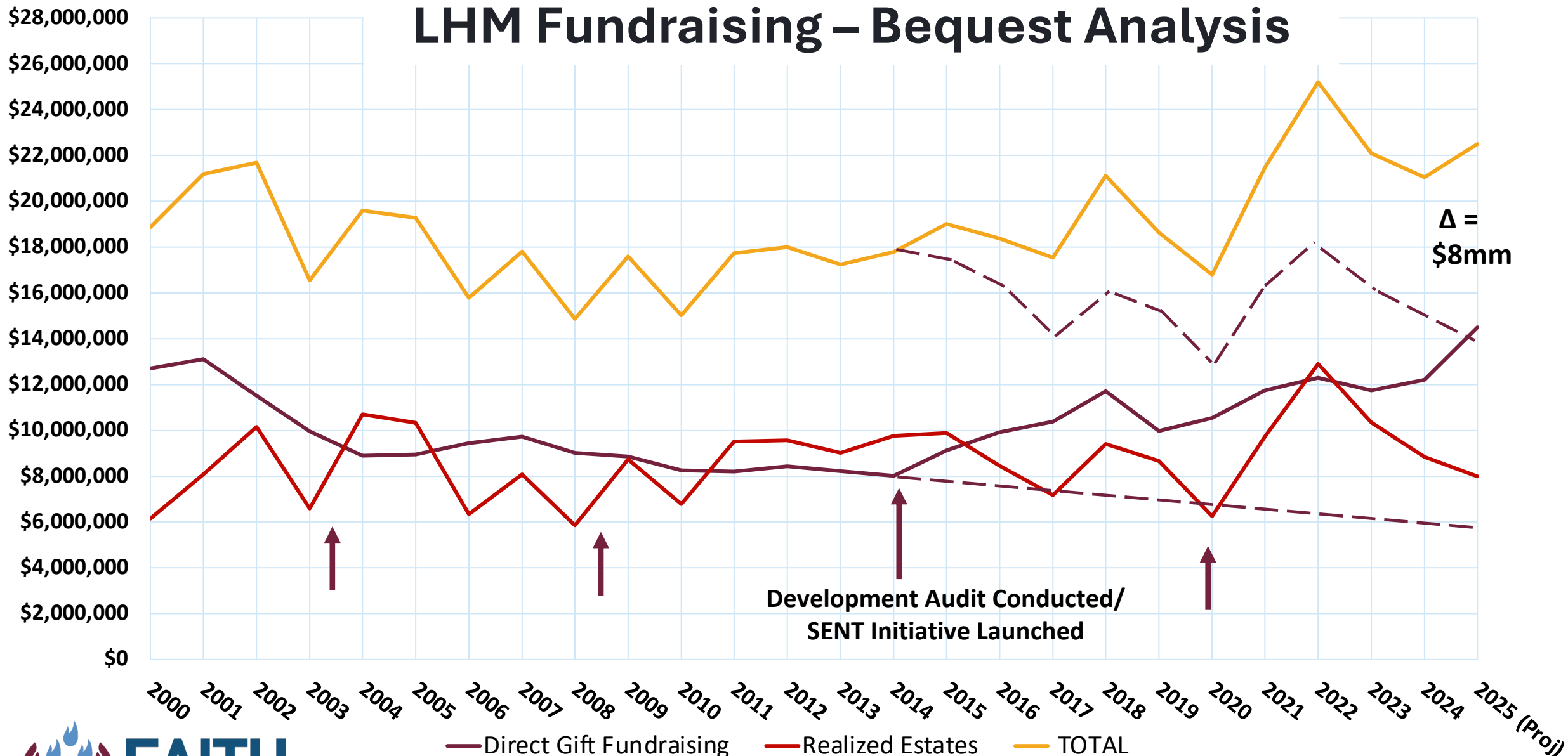
To identify planned giving prospects, look for your most loyal donors, which will be those with history, frequency, and recency.



Creating a Conversation—use surveys!

- Lead generation
- Discover legacy donors
- Move people to action – **EVEN IF YOU DO NOTHING ELSE!**

LHM Fundraising – Bequest Analysis



— Direct Gift Fundraising — Realized Estates — TOTAL

Lutheran Hour and Money for Ministry

Surveys capture insights from a level of donor that is often overlooked and isn't receiving white-glove treatment, helping you to understand their motivations.

Donor file and
recipient selection



Planned giving is Fun!

What kind of questions do we ask?

PERSON

How did you first connect with our mission?

PASSION

Why do you support the work of our ministry?

PREFERENCE

How do you prefer to support our work?

Surveys with Money for Ministry

Surveys capture insights from a level of donor that is often overlooked and isn't receiving white-glove treatment, helping you to understand their motivations.

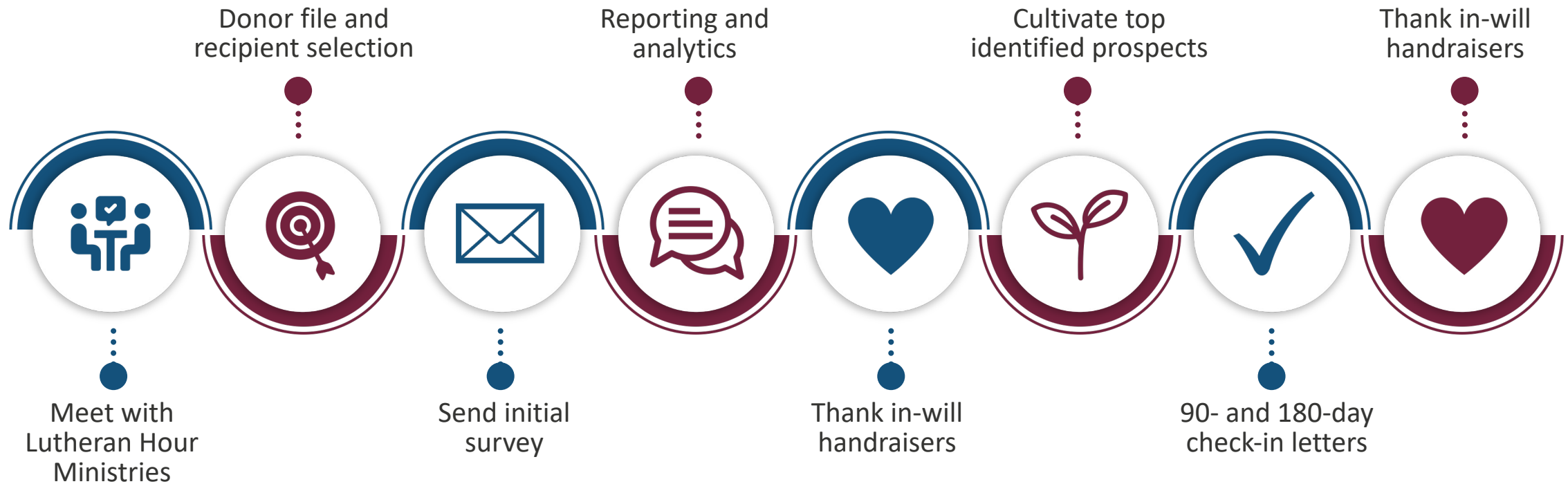


Single Farmer and Legacy donor

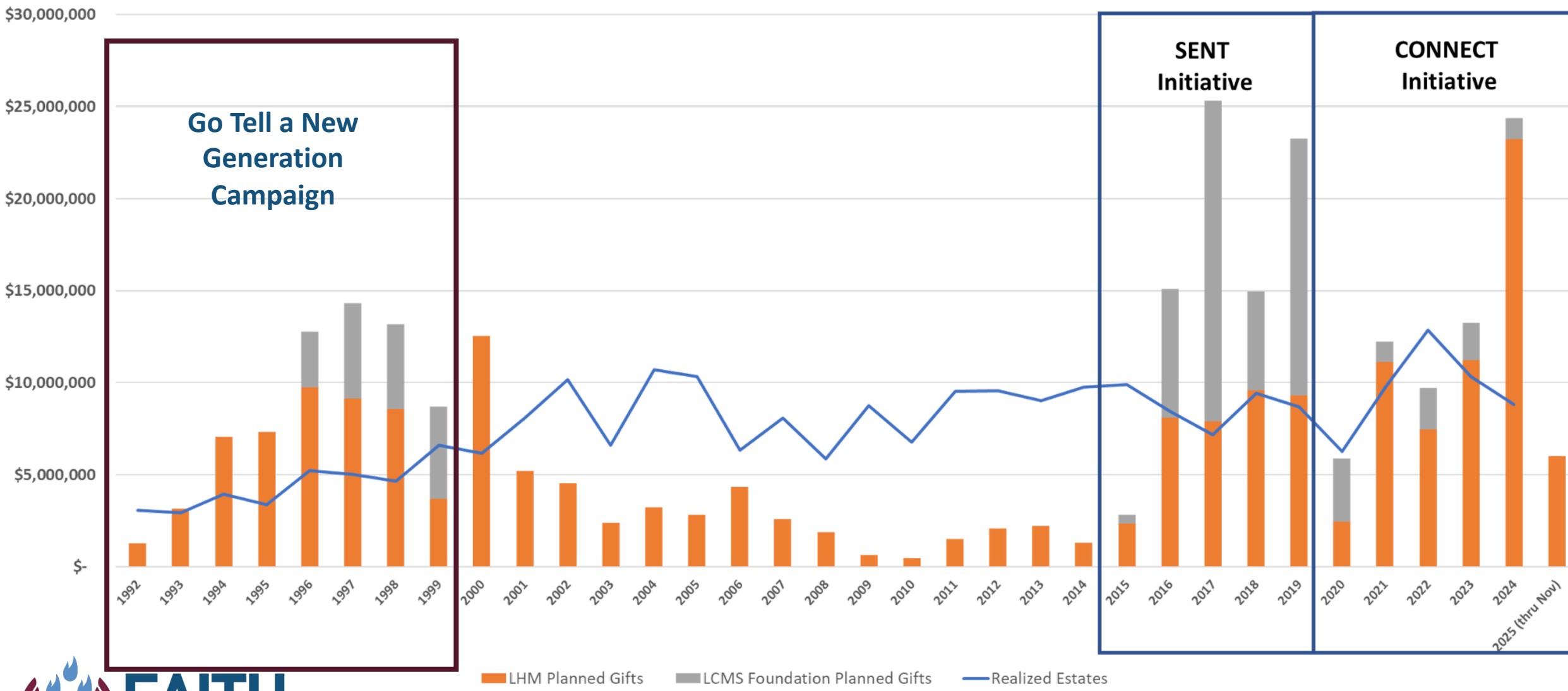


Surveys with Money for Ministry

Surveys capture insights from a level of donor that is often overlooked and isn't receiving white-glove treatment, helping you to understand their motivations.



LHM Planned Giving Analysis



Go Tell a New Generation Campaign

SENT Initiative

CONNECT Initiative



LHM Planned Gifts LCMS Foundation Planned Gifts Realized Estates

MOMENTUM DASHBOARD

LEGACY GIFTS IN THE PIPELINE

LUTHERAN HOUR MINISTRIES

JANUARY 2025



ALL TIME LEGACY GIFT COMMITMENTS*

\$145,250,000

HOUSEHOLDS: 2,905

Hoffman Society list + unconfirmed gifts from survey responders

\$196,150,000

INDIVIDUALS : 3,923

Hoffman Society list + unconfirmed gifts from survey responders

YOUR LEGACY GOAL

3,100 Reported Households

\$155M*

**PROJECTION BASED ON AVERAGE LEGACY GIFT OF \$50,000*

Current Survey Results: 4,968 DONORS ENGAGED IN PLANNED GIVING DIALOGUE

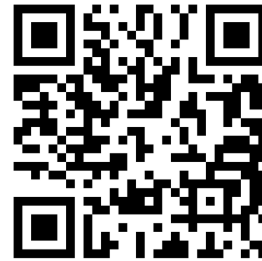


THANK YOU!

SCAN FOR A FREE
COPY OF OUR
MAKE A WILL
MONTH KIT



CONNECT WITH US ON LINKEDIN



DOUG BOUWS



TERRY BIESBOER