



Donor-Centered Planned Gift Marketing: (AFP Fund Development Series)

By Michael J. Rosen

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A fresh step-by-step guide for identifying your nonprofit's planned giving prospects and inspiring them to give generously

Donor-Centered Planned Gift Marketing helps nonprofit organizations move beyond traditional marketing techniques that have historically yielded only modest results and reveals how putting the focus on the donor can produce the best outcomes for all. Here, nonprofits new to gift planning will learn to market effectively from the start while those with established programs will discover ways to enhance their efforts. You will learn about various donor-centered marketing channels and techniques, as well as how to generate internal support for an improved planned gift marketing effort.

- Full of useful and proven tips you can implement for immediate results
- Offers practical tools including forms and checklists
- Includes a worksheet to help organizations calculate their planned giving potential

Sharing the latest research findings, this book shows you how to identify who your planned giving prospects are. You will learn how to effectively focus on them through meaningful communication that ultimately inspires them to give and give more.

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Bibliography

- Sales Rank: #591464 in Books
- Published on: 2010-10-26
- Original language: English
- Number of items: 1
- Dimensions: 10.00" h x 1.00" w x 7.02" l, 1.48 pounds
- Binding: Paperback
- 384 pages



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Editorial Review

Review

"Michael's book is the first of its kind to place the emphasis on the planned giving donor right from the start. In marketing our planned giving programs we traditionally focus on promoting the organization, then we spotlight the donors. Jumpstart or enhance your planned giving program with this book and doubt your organization will be in a wonderful position to get the planned gifts it deserves."

— Laura Fredricks, LLC, author of *The ASK: How to Ask for Support for Your Nonprofit Cause, Creative Project, or Business Venture*.

"Donor-Centered Planned Gift Marketing by Michael Rosen is a comprehensive, well-researched and practical guide to the marketing of planned gifts via a donor centered process. The book will be of interest to both those new to planned giving and those seeking to take their program to a higher level."

— Philip Cubeta, CLU, ChFC, MSFS, CAP, The Sallie B. and William B. Wallace Chair of Philanthropy, At The American College

"Never has there been a better time to talk about planned giving. It is an effective tool for developing resources for an organization and it is a meaningful way to truly engage with one's donors. This book provides a thorough roadmap for both the nonprofit that needs to start and the nonprofit that needs to expand their efforts in developing an effective, well-planned and successful development effort using planned giving."

— R. Andrew Swinney, President, The Philadelphia Foundation

Michael Rosen's *Donor-Centered Planned Gift Marketing* should become the Bible for anyone seeking to raise money from planned gifts. His donor-centered approach combined with useful examples and a wealth of practical tips and helpful hints, makes the book a must-have reference for anyone working in gift planning.

— Phyllis Freedman, President, SmartGiving, The Planned Giving Blogger

"Rosen writes with a clarity that displays his depth of knowledge and breadth of experience. He articulates principles that will benefit everyone from CEOs and chief development officers to experienced gift planners and part-time fund raisers. Vivid illustrations from colleagues throughout the United States make the concepts very real and practical. *Donor-Centered Planned Gift Marketing* is an indispensable handbook for anyone who wants to achieve planned giving success."

— Robert E. Fogal, PhD, ACFRE, CAP, Minister of Philanthropy, Pennsylvania Southeast Conference of the United Church of Christ

"The number one training topic requested by PPP members is planned gift marketing. Michael Rosen answers that need with a well-organized approach, interesting anecdotes, a reader-friendly writing style, and a wealth of practical information."

— Tanya Howe Johnson, CAE, President and CEO, Partnership for Philanthropic Planning

"Rosen has artfully crafted an insightful, inspirational, and comprehensive road map for discerning planned gift donor engagement. By using the strategies and stories in *Donor-Centered Planned Gift Marketing*, professionals at all levels of proficiency can optimally engage and steward a donor's passion and purpose for a better world through significant and heart-felt gift planning that will last more than their lifetime. This is a

win-win book for all who care about future generations and vibrant communities."

—Margaret May Damen, CFP, CLU, ChFC, CDFA; Founder, The Institute for Women and Wealth, Inc.; coauthor, *Women, Wealth and Giving: The Virtuous Legacy of the Boom Generation*

"This is one of those rare books that delivers more than it promises, and it will appeal to the specialist and generalist alike. It not only makes a case for a new approach to marketing, as the title would suggest, but it is also a practical guide for the entire process of planned giving, easy to understand because of the clear style and numerous examples, and with exercises to implement what is learned."

— Frank Minton, Senior Advisor, PG Calc; Founder, Planned Giving Services; Past Chair, American Council on Gift Annuities

From the Back Cover

IDENTIFY YOUR BEST PLANNED-GIVING PROSPECTS AND INSPIRE THEM TO GIVE MORE

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About the Author

Want to have happier, more trusting donors who will give more often and more generously than ever before? A must-read for every nonprofit development and marketing professional, *Donor-Centered Planned Gift Marketing* introduces insightful advice for launching or improving a successful, well-rounded planned gift marketing program. Author and fundraising innovator **MICHAEL J. ROSEN** has drawn a line in the nonprofit sand: put even a few of the ideas in this book to work in your organization and watch your donors give more and your planned giving program grow more.

Users Review

From reader reviews:

Anthony Thies:

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Titus Johnson:

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Lillian Trimmer:

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