



Sample Planned Giving Letters

The samples below are intended for your use as you prioritize planned giving communications for your organization with donors. Customize these with your organization's voice and brand and refine them to match the moment and the donor.

Sample Letter #1: Legacy Society Invitation – All Audiences

Because of your belief in our commitment to (INSERT SHORT MISSION), I want to personally invite you to become a member of (YOUR ORGANIZATION)'s Legacy Society, (SOCIETY NAME). The society is composed of generous and forward-thinking donors who will support our long-term success through a planned gift.

It's easy to do. While cash contributions are always appreciated, there are creative and flexible giving options that can benefit you and (YOUR ORGANIZATION). Consider, for example, donating real estate, stocks or other assets in return for a series of regular payments. Many planned giving options offer generous tax benefits as well. Whether it is naming (YOUR ORGANIZATION) as the beneficiary of a retirement account or life insurance policy or gifting other liquid or non-liquid assets, we encourage you to consult with your financial advisor to discuss the options.

The enclosed materials provide an overview of planned giving options. More information is also available on our website, (INSERT LINK). No matter what you choose to give, you will be honored through:

- (BENEFIT #1: Recognition on our website)
- (BENEFIT #2: Tributes in publications such as X, Y & Z)
- (BENEFIT #3: Invitation to an annual (SOCIETY NAME) event)

Ensure the sustainability of (ORGANIZATION NAME) in a way that makes your core values known to others. Generations to come will benefit from your gift. Your support of our mission will be long remembered and serve as an inspiration to others.

Sample Letter #2: Legacy Society Invitation for Current Donors (No Planned Gift Recorded)

Thank you for your ongoing support of (ORGANIZATION NAME). Your donations advance our commitment to (SHORT MISSION). I want to personally invite you to become a member of (ORGANIZATION NAME)'s exciting new legacy society, (SOCIETY NAME).

The society is composed of generous and forward-thinking donors who will support our long-term success through a planned gift. It's easy to do with creative and flexible giving options that can benefit you and (ORGANIZATION NAME). Consider, for example, donating real estate, stocks or other assets in return for a series of regular payments. Many planned giving options offer generous tax benefits as well. Whether it is naming (ORGANIZATION NAME) as the beneficiary of a retirement account or life insurance policy, or gifting other liquid or non-liquid assets, we encourage you to consult with your financial advisor to discuss the options.

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Ensure the sustainability of (ORGANIZATION NAME) in a way that makes your core values known to others. Generations to come will benefit from your gift. Your support of our mission will be long remembered and serve as an inspiration to others.

Sample Letter #3: Legacy Society Charter Member Letter

I want to personally thank you for your ongoing support of (ORGANIZATION NAME). Your generous promise of a planned gift helps ensure the long-term sustainability of our mission to (SHORT MISSION DESCRIPTION). As a forward-thinking donor, you will now become a founding member of our new legacy society, (SOCIETY NAME). Throughout the year we will honor you and the other members of the legacy society through:

- (BENEFIT #1: Recognition on our website)
- (BENEFIT #2: Tributes in publications such as X, Y & Z)
- (BENEFIT #3: Invitation to an annual (SOCIETY NAME) event)

Thank you again for your support of our mission now and in the future. Your generosity and philanthropic legacy will long be remembered.

Sample Letter #4: Planned Gift Confirmation and Thank You

I want to personally thank you for your ongoing support of (ORGANIZATION NAME). Your generous promise of a planned gift helps ensure the long-term sustainability of our mission to (INSERT SHORT MISSION).

I would also like to take this opportunity to welcome you as a member of our new legacy society, (SOCIETY NAME). The legacy society is composed of forward-thinking donors like you who have opted to make their core values known to future generations through one of the many different types of planned gifts. To show our ongoing appreciation, we will honor you and the other members of the legacy society throughout the year with:

- (BENEFIT #1: Recognition on our website)
- (BENEFIT #2: Tributes in publications such as X, Y & Z)
- (BENEFIT #3: Invitation to an annual (SOCIETY NAME) event)

Thank you again for your support of our mission now and in the future. Your generosity and philanthropic legacy will long be remembered.