

GIFT PLANNING PROGRAM MANAGEMENT

*Stop waiting for the phone to ring.
We can help you generate more planned giving activity.*

AVAILABLE SERVICES*

Planned Giving Support: Our team will coach and advise you through donor opportunities. We'll even join you for gift planning conversations with your prospects.

Planned Giving Inquiries Response: If you don't have the bandwidth or comfort level to respond to PG inquires, we'll respond on your behalf.

Review Planned Giving Documents: A sustainable planned giving programs requires a solid infrastructure. We will review and update your existing planned giving documents including gift acceptance, gift counting, stewardship policies and more.

Prospect Strategy Sessions: Spending time discussing strategies about your best planned giving prospects will help ensure that you are having the right conversations with the right prospects. Sessions include top prospects discussion and strategy.

Website Content Management and Updates: You need simple and actionable content on your website to let donors know you encourage non-cash gifts. We'll provide you with up-to-date content to add to your website.

Planned Giving Email Design: You need to continually message planned giving to your donors. Email is one of the quickest and most cost-effective ways to do that. We will design a series of emails for you to send to your prospects encouraging them to take action and contact you for a planned giving conversation.

Planned Giving Qualification Calls: If you have more loyal donors than you can reach, we can help by picking up the phone, thanking those donors and qualifying them to discover their interest in a major of or planned giving conversation.

*Services available based on level of support (see reverse side)

CONTACT US

Joe Tumolo
610-653-7906 • info@mpgdevelopment.com
www.mpgdevelopment.com



MAJOR & PLANNED
GIVING DEVELOPMENT
Advancing Your Mission Together

Planned Giving Services	Outsourced Planned Giving Levels		
Planned Giving Support via Email/Phone (up to 2 hours a month)	◆	◆	◆
Planned Giving Inquiries Response (with 24 hours of all inquiries)	◆	◆	◆
Gift Planning Board Presentation (one-hour prep meeting and one-hour presentation)	◆	◆	◆
Review Planned Giving Documents and Provide Suggested Updates		◆	◆
Facilitate PG Prospect Strategy Sessions (6 times a year)		◆	◆
Website Content Management and Updates (2 times a year)		◆	◆
Planned Giving Email Design (4 times a year)		◆	◆
Planned Giving Qualification Calls (250 phone outreach attempts per month)			◆
COST PER MONTH (BASED ON 12 MONTH CONTRACT)	\$1,000	\$2,000	\$3,000

Joe Tumolo
610-653-7906 • info@mpgdevelopment.com
www.mpgdevelopment.com