

Forever Green: Building a Sustainable Future via Planned & Non-Cash Giving

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What are Planned Gifts?!

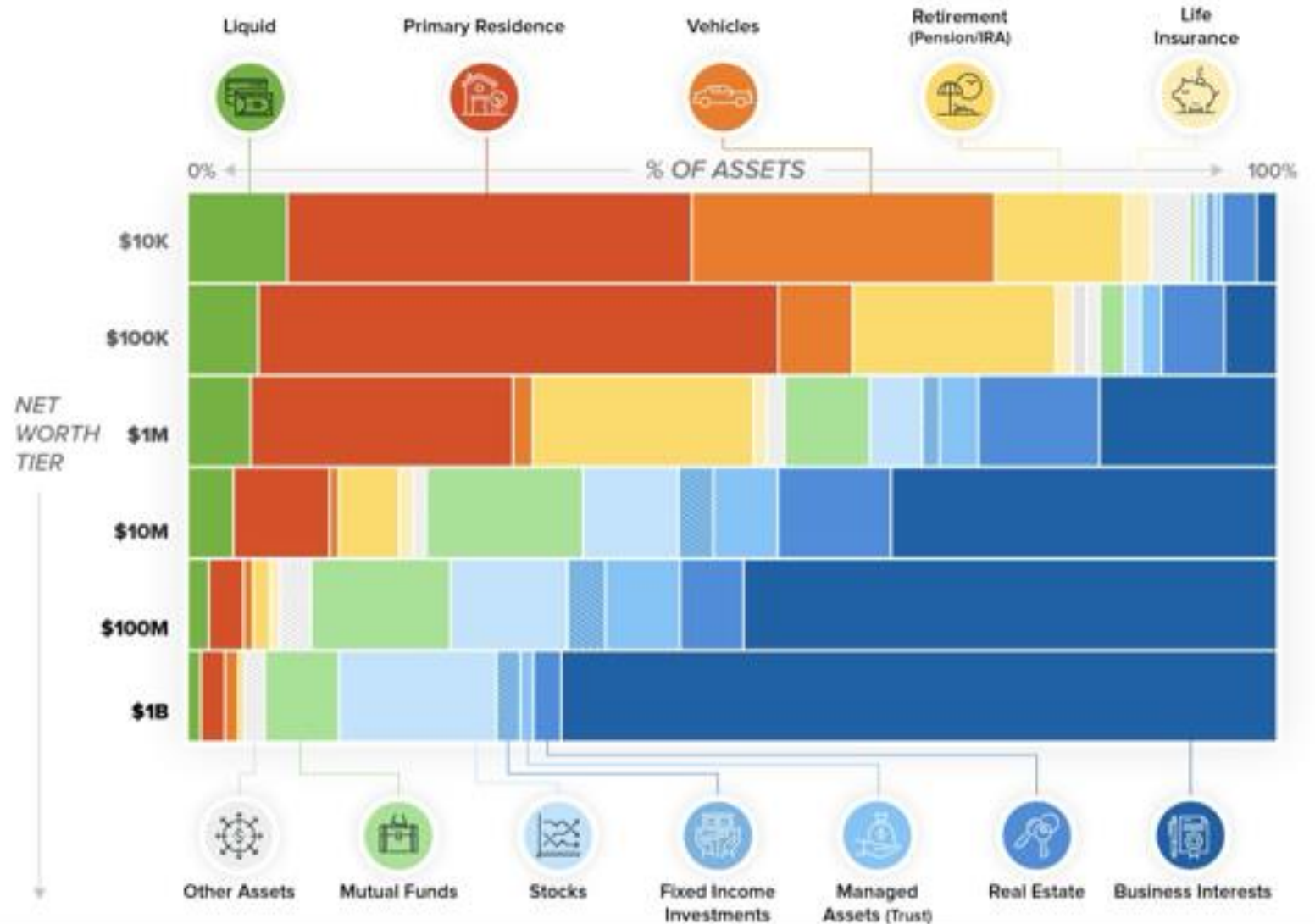
AKA Legacy Giving

- Unrestricted and Restricted
- General Fund and Endowment
- Revocable and Irreversible Gifts
- 100% Charitable and Split-Interest Gifts
- Gifts given today, tomorrow, during, and after lifetime
- **GIFTS THAT ARE MADE AS PART OF A DONOR'S FINANCIAL AND CHARITABLE PLANNING (...Planned Gifts!)**



Sources of Wealth by Income Level

- Liquid assets
- Primary residence
- Vehicles
- Retirement plans
- Life insurance
- Stocks
- Business Interests



One Slide Summary of Planned Gift Types

- Bequests
- Beneficiary Designations
- DAF Gifts
- Qualified Charitable Distributions from Retirement Plans
- Outright Gifts of Non-Cash Assets
- Split Interest Gifts



Myths & Arguments against Planned Giving

- “*Cash is King*”: **FACT:** Only 5% of this nation’s wealth is in cash. The other 95% is in assets like stocks and property.
- “*But we need cash now!*” **FACT:** Studies show that those who include a charity in their estate plans (the definition of planned giving!) also increase their outright/annual giving by about **75%**—and it stays up.
- “Planned gifts aren’t worth all the effort they require.” **FACT:** The typical completed planned gift is **200 times the size** of a donor’s largest annual fund gift.



Source: plannedgiving.com

Planned and non-cash gifts work - even for small shops!

- It's here: **The Greatest Wealth Transfer** in recorded history: \$30-70 Trillion → enormous potential for your organization!
- Planned giving to a charity= significant tax benefits for donors.
- The nonprofit's role: We can offer our donors strategies to maximize the impact of their giving.
- BUT, we are **not** in the business of giving tax or financial advice. Always, stress that a donor should consult with a **professional advisor**.
- Awkward? Bequests make up most of planned gifts, BUT - it's not just about "Death"! Non-cash assets.
- Most likely you already have planned giving donors, so this is no pie in the sky!
- How to the accept the gifts



Organizational Readiness

- Vision
- Integrity
- Efficiency
- Transparency
- Impact
- Longevity

Fundraising Program Readiness

- Capacity
- Culture
- Process

Professional Readiness

- Knowledge & Skills
- Experience & Network

Planned Giving Readiness Assessment



Launching your planned giving program

- Educate your donors and yourselves to be the best fundraisers possible
- High-level donor conversations about the variety of planned gift options
- Prospecting
- Outreach and marketing: An outreach calendar: newsletter, website, specific emails or direct mail. Donor testimonials from current planned giving donors is gold!
- [PlannedGiving.Com Calendar](https://www.plannedgiving.com)



Planned Giving Resources

Calendars

- [Giving Docs Planned Giving Calendar](#)
- [PlannedGiving.Com Calendar](#)
- [Stelter Planned Giving Dates to Celebrate](#)

LinkedIn Follows

- [Dr. Russell James](#)
- [Craig Wruck](#)

Texts

- [Planned Giving in a Nutshell](#)
- [The 72 Hour Planned Giving Starter Program](#)

Websites

- [Colorado Planned Giving Roundtable](#)
- [PlannedGiving.Com Myths and Facts](#)
- [EncourageGenerosity.com](#)



Questions?!?!



Thank you!

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