

A dark blue arrow points to the right from the left edge of the slide. Several thin, curved lines in shades of blue and grey sweep across the left side of the slide, creating a dynamic, abstract background element.

Leveraging

Partnerships with
Professional Advisors

To Obtain Planned Gifts



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Pleiades Nonprofit Advisors
President

Advisor Partnership Teams

- Estate Planning Attorneys
- Financial Advisors
- CPAs/Accountants
- Insurance Agents
- Realtors
- Fiduciaries

60%



PG Committees

- Planned Giving Advisory Board
- Advice and Questions
- Referral List for Donors
- Pilot Group
- Speakers Bureau
- Ongoing or Project Based?



Where do I find them? Recruitment

- Advertisements, self identify
- Nonprofit connections
- Advisory board
- Networking
- Spanish Speakers

60%





Legal Liability

- ▶ Disclosure at beginning of seminar
- ▶ Volunteer status – not an employee
- ▶ Due Diligence
- ▶ Code of Conduct
- ▶ Partner Closely
- ▶ Trust your instinct- Would I use this advisor?

Advisors: Who Makes the Cut?

- Due Diligence
- Member of Bar in good standing
- Liability Insurance
- 50% Estate Planning
- Yelp/Google
- In-depth interview
- Financial licenses/FINRA



Advisors **follow-up**

- Mutually beneficial relationship
- Conduct consultations after the seminar
- Move forward with estate plans and gifts
- Encourage client giving
- Provide donor info back to you

60%





Advisors

- Two segments
 - Referrals
 - Speakers bureau

Training Advisors for Speaker's Bureau

- Training annually
- Personable
- Slide deck and talking points
- Code of Conduct
- Shadowing
- Review their presentation skills

60%



Show Appreciation

- They are as important as donors
- Summer Soiree
- Holiday party
- Happy hour
- Lunches
- Special newsletters

60%



What is a Seminar Program?

Estate Planning Seminars given at your agency-locally, regionally or online

Provides general info on what is needed in an estate plan – wills, trusts, powers of attorney

Is done by PG staff, attorney and financial advisor

Primary focus is on Estate Planning, secondary is planned gift information



Keys for Success

- ▶ Hold Seminars Tues, Wed, Thurs
 - ▶ Afternoon and Evening to accommodate all
- ▶ Hold in comfortable, familiar location
- ▶ Hold follow ups in same location
- ▶ Do not discuss or disclose fees
- ▶ Continue to hold as donors go to several
- ▶ Tag-team on follow-up
- ▶ Pursue Spanish speaking engagements
- ▶ Plan for long term dedication to program



Outcomes

- ▶ Held average of 60 seminars per year
- ▶ Secured 17 expectancies at one location
- ▶ Baseline year was \$6MM in realized and expected gifts
- ▶ Year 5 was \$36MM in realized and expectancies
- ▶ Total over 5 years was \$110MM

Thank you!

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