



## PLANNED GIVING BY DESIGN

### Accelerate your planned giving program

If the past two years taught us anything, it is that a secure financial foundation is critical for nonprofit organizations. Those nonprofits with healthy reserves and endowment funds had more options than those who didn't, allowing them to retain staff, adjust their programs to meet new community needs and continue their important work amidst unprecedented challenges.

**DBD Group can help you focus on the simple, consistent actions that will help you identify, engage and invite donors to make a legacy gift to your nonprofit organization.**



#### PROSPECT IDENTIFICATION

- DonorSearch wealth screen
- Top 20/Next 30 prospect list

#### POLICY AND PROGRAM DEVELOPMENT

- Assessment of current policies and committee structure
- Three-year plan development

#### EDUCATION AND INVITATION

- Partnership with Crescendo for online and print communications program
- Legacy Society strategies

#### CUSTOMIZED COACHING

Accountability and tools to help you make planned giving cultivation a regular part of your development program.

**If not now, when? There has never been a better time to have these legacy-building conversations.**

Pricing and more details on back side.

**Let's get started today!**  
**info@dbd.group • dbd.group**



“Planned gifts don’t just benefit a nonprofit organization. They also benefit the donors who make these gifts by helping them better manage their assets both during their lifetimes and beyond.

Like with all financial development, activity leads to results. DBD’s Planned Giving By Design gives you the framework, tools and accountability to make a lasting change in your organization that will have an impact long after your tenure as leader.”

Robyn Furness-Fallin, CFRE  
Senior Consultant, DBD Group

## PRICING AND INCLUSIONS

### PLANNED GIVING BY DESIGN

At all levels, the program includes:

- Onsite and virtual coaching
- One year subscription to DonorSearch
- Curated donor communication tools from Crescendo\*
- Case for support
- DBD’s Planned Giving Vault - resources, templates and samples
- Quarterly group zoom calls with guest speakers to share ideas, best practices and inspiration

Your participation provides **access for multiple users** so you can share with your team to allow you to work your plan together.

## CHOOSE YOUR LEVEL OF SUPPORT



### ACCELERATOR

**\$2,500/month**

- Ideal for the nonprofit looking to relaunch or build a planned giving program from the ground up
- Includes all features of Planned Giving by Design PLUS two on-site coaching sessions per year and three hours of virtual coaching per month

### LEGACY BUILDER

**\$4,500+ /month**

- For the nonprofit ready to make a generational impact on their organization and those they serve
- Includes all the features of Planned Giving by Design PLUS six on-site coaching sessions per year and three hours of virtual coaching per month. More annual on-site days available for an additional fee.

**SIGN UP  
TODAY!**



Contact your DBD consultant  
or [info@dbd.group](mailto:info@dbd.group)

**DBD** DBD Group

\*Requires separate contract. If you have a relationship with a different vendor, we can work to accommodate their materials into this plan.