

Canopy *Planned Giving Marketing Calendar*

January

New year, new goals
It's time to create or update your will.

Email a link to the Planned Giving page on your website. Don't have one? We can help. [Connect with us to learn how.](#)

July/August

Make a Will Month (August)
A will is more than transactional; it can be transformational.

Use elements from our [Make a Will Month toolkit](#): Emails, social media posts, newsletter articles.

February

Share the love
A Legacy Love Letter (ethical will) is a meaningful way to share your values with your loved ones.

Download our [Legacy Love Letter \(Ethical Will\) Guide](#). Mail or email it to donors.

September

Steward assets, impact lives
Now's the time to plan your year-end gift from your retirement assets.

Use elements from our [QCD Toolkit](#) for a targeted donor mailing.

March

Giving made easy
Donor Advised Funds make giving simple and flexible.

Include an article about Donor Advised Funds in your newsletter. [Use this brochure as a guide.](#)

October

National Estate Planning Awareness Week (Oct 20-26)
Your estate plan serves your family and supports organizations you care about.

Host an event with an estate planning attorney.

April

Plan now for tax savings later
Giving non-cash assets extends your impact and can save you money on taxes.

Use our [Appreciated Assets toolkit: Postcard, newsletter ad, social media post, email, etc.](#)

November/December

Gratitude & Giving
Your giving changes lives. Here's how we put your gifts to work this past year.

Thank legacy donors around Thanksgiving or with a Christmas/year-end thank you card.

May/June

What matters most
Life events like weddings and graduations get people thinking about sharing their values and leaving a legacy.

Share content like "[A Lesson Learned Should Be a Lesson Shared](#)" on your blog or in your newsletter.

Want to learn more?

Check out canopy-giving.com
or email Leah@canopy-giving.com



Canopy
Planned giving—covered.