



Discover what's possible.

Simple Calculations to Start
Your Planned Giving Journey



How much revenue can we grow?

Imagine what a steady pipeline of future gifts—**hundreds of thousands, or even millions**—could achieve for your organization. Strengthen your operations, expand your mission, and ensure a legacy of impact that lasts for generations.

It's all possible with the right focus, message, and support to guide you.

CALCULATE YOUR PLANNED GIVING POTENTIAL

Our benchmarks show that 3.5%–5.5% of active donors are likely to consider legacy giving, with average in-will gifts ranging from \$50,000 to \$80,000.

To get a picture of your planned giving potential, simply multiply your total active donors by 0.035 (3.5%).

active donors

POTENTIAL LEGACY GIVERS

\$

potential legacy givers

POTENTIAL LEGACY DOLLARS

This foundational calculation can help you set a visionary goal for your planned giving program. To reach that goal you have to focus your efforts on the highest return.

The right framework can uncover which donors are most likely to plan an estate gift. >>

Scan to use our
online planned giving
calculator.

THE POTTER'S HOUSE | RESULTS

\$7.75M



INCREASE IN
PIPELINE VALUE

SHIFT FROM UNCERTAINTY
TO CONFIDENT VISION

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When our board members received our results from Canopy, they had tears in their eyes. They identified millions of dollars of estate designations that we were previously unaware of.

Canopy is about more than just achieving goals as a means to an end...they changed our perspective of the future.

—JOHN BOOY, SUPERINTENDENT



CAPITAL CITY RESCUE MISSION | RESULTS

480%

INCREASE IN KNOWN
LEGACY GIVERS

\$6M

GROWTH IN PIPELINE
EXPECTANCIES



Canopy helped us realize that we have donors who love our organization but need to be shown how they can continue to support us even after they are gone.

We received a notification today...that we will be receiving over \$400,000 from a special donor who passed in January.

—SUE JONES, DIRECTOR OF DEVELOPMENT

Which donors are most likely to make a planned gift?

Not all donors are equally likely to make a planned gift. Within the limits of your time and resources, it's important to strategically narrow your efforts to yield the greatest result.

Apply this simple framework to sharpen your focus on your strongest potential donors.

IDENTIFY TOP PROSPECTS USING 12-12-12 FRAMEWORK

12 Years on File

Look for donors who have been supporting your cause for at least 12 years. Consistent loyalty is a strong indicator of a donor's likelihood to consider legacy giving.

A Gift Within the Last 12 Months

Donors who have recently given are more likely to be top-of-mind and receptive to conversations about legacy giving. The ideal range is a gift within the last 12-24 months.

At Least 12 Gifts Total

This data point demonstrates a sustained commitment beyond a one-time gift. It shows that donors value your organization's work over time and are more likely to consider making a legacy gift.

These markers provide a practical starting point for identifying your best prospects. However, the 12-12-12 rule is only a guideline.

Every donor is unique, and additional insights can further refine your approach. >>

How should we ask donors to make a planned gift?

You've identified your top prospects. **Here's where the deep work begins.**

Many leaders feel apprehensive discussing planned giving with donors due its association with death. Canopy's approach **pivots this perspective from death to life.** Purpose, legacy, connection, and inspiration all lead the way.

Use our **3 Ps Framework** to structure your conversations, seed connections, and grow lasting impact.

3 Ps TO DEEPEN DONOR DIALOGUE

1. Person

Who is the donor?

- Ask questions to understand their values, interests, and motivations.
- Examples: "What inspired you to support our work?" "What values do you hope your legacy will reflect?"

2. Passion

Why do they support your cause?

- Discover their personal connection to your mission.
- Examples: "What aspects of our work resonate most with you?" "What change do you hope to see through your support?"

3. Preference

How do they choose to support us?

- Learn their preferred methods of giving and how they wish to be involved.
- Examples: "Would you prefer ongoing support or a one-time legacy gift?" "How can we make the process most comfortable for you?"

Next, understand your program's ROI and gain confidence that you are stewarding your resources well. >>

LOVING SHEPHERD MINISTRIES | RESULTS

250+

HIGH-INTEREST
PROSPECTS IDENTIFIED
FOR FUTURE GROWTH



ENRICHED DONOR
RELATIONSHIPS



We've had a wonderful working experience with Canopy, and their expertise and attention to detail helped our nonprofit establish a connection with our donors and legacy givers.

—JEN SCHWARTZ, MARKETING

SECOND HARVEST HEARTLAND | RESULTS

174%

INCREASE IN LEGACY
SOCIETY MEMBERS

\$7.4M

INCREASE IN
PIPELINE VALUE

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[In our] three-year partnership with Canopy, our planned giving pipeline saw consistent, significant growth, [and] we more than doubled our estate giving society! Their process brought transformative opportunities and offered practical insights and resources to deepen donor relationships.

[The] partnership yielded such successful results that I was able to create a new role for myself as our organization's first full-time Planned Giving Officer.

—KELSEY TYLER, PLANNED GIFT OFFICER

Is it worth it?

Stewarding your investment well ensures that seeds planted today continue to grow and flourish. Measurable data drives our planned giving program.

We've helped hundreds of nonprofits increase their planned giving pipeline, with an average ROI of \$36:1 —that's a powerful future return!

CALCULATING PLANNED GIVING ROI

Determine Your Costs

Add up expenses like printing and postage, staff salaries, event budgets, and website costs to determine how much money you spend directly on planned giving.

Determine Known Legacy Gifts

Calculate how many newly reported in-will gifts you have uncovered in the past fiscal year.

Multiply by Pipeline Value

Multiply the number of known legacy gifts by \$50,000 (average gift size).

Calculate ROI

Divide the in-will pipeline value by your planned giving budget to determine your return on investment.

$$\begin{array}{rcl} \text{known legacy gifts} & \times \$50,000 = & \$ \text{pipeline value} \\ \\ \text{pipeline value} & \div & \text{costs} = \$ \text{ROI (return per dollar spent)} \end{array}$$

What's next?

Canopy has you covered.

Our team is here to guide you every step of the way and help carry the load. Our comprehensive program combined with our done-for-you process allows your organization to reap lasting rewards—without the legwork.



Automated Dialogue

Sit back and enjoy our complete donor survey process—writing, designing, printing, mailing, receiving, responding, and reporting. Seamless from start to finish.



List Segmentation

We refine your donor list to identify those most likely to respond—uncovering fertile ground to deepen conversations and strengthen these relationships.



Website Creation

We'll create a custom-branded website with resources and tools to guide your donors' planned giving journey.



Content Development

Every piece of communication is infused with Canopy's expertly-developed content—tailored to your brand's style and integrated with your marketing plan.



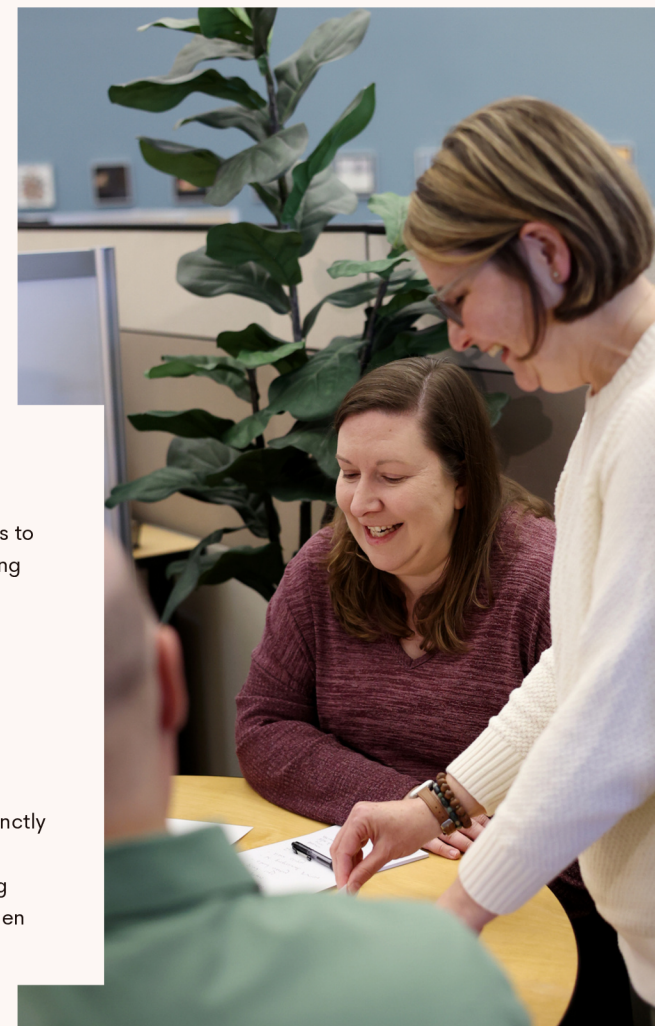
Strategy, Training, & Support

Our team is eager to help you succeed—offering strategic planning, hands-on support, and training to equip you with the tools and insights to carry your work forward with confidence.



Integration

Canopy's planned giving is distinctly designed to integrate into your existing marketing plan, creating lasting efficiencies that strengthen all of your giving efforts.



Let's talk.

Our team would be delighted to get to know your organization and explore what's possible—together.

Schedule a free consultation today.



Scan to schedule or visit
Canopy-Giving.com to learn more