

Introduction Charitable giving trends continue to evolve, and the value of planned gifts remains strong. Donors want to leave a lasting impact that reflects their values, while nonprofit organizations strive for long-term financial stability in a shifting philanthropic landscape. Legacy societies offer a practical and proven way to align these goals, providing meaningful recognition for donors while strengthening engagement and sustaining future impact.

For charitable gift planners, initiating conversations about legacy giving represents more than a best practice, but a strategic opportunity. Including legacy conversations as a value-added service allows gift planners to foster deeper relationships and secure transformational support. When combined with digital tools, such as those offered by Crescendo Interactive, these efforts become more scalable, personalized and effective.

In this study, Crescendo draws from survey data collected from 340 nonprofit sector respondents nationwide to explore how legacy societies build meaningful connections across generations. Crescendo's Marketing study is available as a PDF download.

The experiences shared by participants reveal actionable strategies for legacy society outreach and marketing. We hope this study is informative and helps to generate additional ways to serve your constituents.

Strategic Initiatives for Legacy Society Programs

- Elevate and deepen: Consistent donor recognition for legacy society members builds loyalty and encourages deeper engagement.
- Early and often approach: Proactive legacy conversations serve your donors and their philanthropic goals.
- Intentional focus: Steward your existing legacy members faithfully with intentional and empowering messaging.
- Invite: If any donors are eligible for the legacy society but have not joined, invite them to be part of the membership.

The Role of a Legacy Society

A legacy society is a formal recognition group typically for donors who have included a nonprofit organization in their estate plans. Some organizations may have additional criteria for legacy society admission, such as creating a charitable gift annuity (CGA) or charitable remainder trust (CRT). While the method may differ from one nonprofit to another, the core concept remains consistent to publicly and personally honor donors for their future commitment.

Recognition plays a key role in donor retention. Even small, thoughtful gestures like a personal thank you note or call can reinforce the donor's commitment. These simple acts can advance trust and signal appreciation in a way that deepens emotional ties, which often leads to stronger connections and continued support year after year.

Legacy societies also reinforce donor identity by creating a community of like-minded philanthropists. When donors see themselves as part of a valued group sharing a collective vision, their connection to the mission

strengthens. This sense of belonging often translates into greater loyalty and advocacy. Peer influence proves to be a powerful motivator. Highlighting donors from the legacy society can encourage new donors to give in similar ways.

Legacy society membership promotes deeper engagement and provides a structured way to identify, cultivate and steward donors who have made future commitments. Nonprofits are better able to plan for long-term financial stability when legacy gifts are known, and legacy societies provide clearer insights into future giving potential, aiding in budgeting and strategic planning.

According to the survey data, 29.9% of respondents reported that the most common form of recognition is personalized thank-you letters or phone calls. These simple yet meaningful gestures demonstrate genuine appreciation and often deepen the emotional connection between donors and the mission they support.

Other widely used recognition methods include special events or receptions (22.3%), inclusion in donor honor rolls or publications (21.8%), and exclusive communications or newsletters (17.2%). These efforts help reinforce a sense of belonging and build a feeling of community.

A small but creative segment indicated they use other recognition methods (8.8%) and provided details about the unique gifts offered, including branded items like coffee cups, scarves, ties, lapel pins, framed certificates and personal meetings with nonprofit leadership.

Virtually all respondents surveyed noted they offer some form of recognition to donors who join their legacy societies. This affirms that acknowledgment is an essential part of the foundation for effective stewardship.

Donor recognition should be sincere and consistent. Any recognition gifts from the nonprofit to the donor should be nominal to avoid being deemed quid-pro-quo, which would impact the donor's charitable income tax deduction. Organizations that consistently recognize legacy donors help create a culture of gratitude, visibility, and community. These are key elements that support donor retention and encourage others to consider their own legacy.

“It’s human nature, people appreciate being recognized and thanked, even if they say it’s not necessary. Feeling seen and valued as part of something meaningful makes a real difference.” George Cruz, Director of Legacy Gifts, The Lord’s Place

When to Introduce Legacy Giving Concepts

Timing is a critical factor in successfully introducing legacy giving. While many nonprofits traditionally wait to discuss planned gifts until after a donor has demonstrated long-term commitment, there is a growing shift toward integrating legacy language earlier in the donor's journey.

Survey responses indicate that the majority of organizations still introduce the topic after multiple gifts have been made (31.3%) or during estate planning conversations (30.4%). However, a notable segment (14.2%) opens discussions on legacy opportunities during the first major gift ask, signaling a trend toward normalizing these conversations earlier.

Additionally, 15.2% of respondents described employing alternative strategies, such as integrating planned giving language into welcome materials or donor communications. Only 8.9% reported waiting for the donor to initiate the conversation.

This data highlights an important takeaway: organizations that proactively and thoughtfully introduce legacy giving, create more opportunities for meaningful engagement and future support.

Legacy giving language in newsletters, donor receipts, inserts, emails, websites and mass communications helps keep the concept front and center. Language choices can make the conversation feel more natural. Instead of using technical language such as “designate us as a beneficiary,” consider more mission oriented language such as “leave a gift that reflects your values” or “make your story part of our future.”

Survey responses revealed a rich variety of strategies beyond the traditional approaches. Some organizations emphasize planned giving from the very beginning, even including legacy options in first-time donor proposals. Engaging development staff, volunteers and board members in these conversations helps introduce legacy giving organically throughout the relationship.

Events, including educational programs and estate planning workshops, provide additional opportunities to discuss legacy giving. Professional advisors, attorneys, wealth managers and CPAs play a pivotal role in introducing and guiding clients through charitable estate planning. Advisors who encourage philanthropic discussions help clients leave legacies that reflect their values.

By embedding legacy giving into the donor journey, organizations create a culture where these conversations are expected and welcomed, encouraging more donors to take the next step. Rather than wait for a single perfect moment, organizations benefit from normalizing planned giving as a natural part of ongoing donor communication.

Legacy Society Membership Trends

Legacy societies vary in size, from small groups of a few dozen donors to large rosters numbering in the thousands. Regardless of size, consistent stewardship is key. Even a small group of well-recognized donors can lay a strong foundation for future growth.

Survey results showed the following breakdown of membership size:

- 26.3% had 50 or fewer members
- 38.2% had between 51 and 300 members
- 12.7% had between 301 and 500 members
- 6.8% had 501 to 999 members
- 13.1% had more than 1,000
- 2.9% did not have any members and/or a legacy society

Based on survey results, the median size of a legacy society was 125 members. This suggests that while a few organizations manage very large programs, most maintain small to mid-sized groups that still offer strong opportunities for stewardship and growth.

The survey results suggest that smaller legacy societies often play a critical role in donor engagement and long-term fundraising success. Organizations with 50 or fewer members still benefit from formalizing recognition and cultivating meaningful relationships with these future givers. Legacy society groups provide the nonprofit with a way to celebrate loyal donors.

Legacy societies scale best when built on authentic relationships and consistent stewardship. Larger programs often benefit from dedicated staff, regular communications and technology platforms that help automate outreach and track membership. If your organization has not created a legacy society, now might be the right time to launch the group with meaningful stewardship opportunities and personal connections.

“I think starting small is better than not starting at all. I think that it is important to remember because not all organizations have a person dedicated to planned giving or even major gifts. There are a lot of small fundraising shops, and it is okay to take small steps to build a program.” Amber Landis, Director of Development, Humane Society of Ventura County

Converting Planned Giving Donors to Legacy Society Members

Not all donors who have made planned gifts are formally recognized in legacy societies. This may be an opportunity to review and formally recognize the donor for his or her loyal support, even if years have passed since the initial gift was made. Tracking and closing this gap represents a valuable opportunity for stewardship. Incorporating legacy society enrollment steps into existing gift intake or stewardship processes helps ensure that donors feel appreciated and connected.

The results of the survey highlight the room for improvement in tracking donor engagement and formal recognition. Well-managed legacy societies can unlock new opportunities to deepen relationships, even for donors who have yet to finalize the amount or type of their planned gift. Nonprofits may consider incorporating a legacy society invitation into a thank you letter when the gift meets the criteria for legacy society membership.

“We welcome people who let us know that our school is in their plans even if they are not ready to document the exact amount.” Suzan Greenup, Director of Planned Giving, Wheaton College

Most Common Types of Planned Gifts

Simple, accessible giving options remain dominant for planned giving. Bequests through wills or trusts, and beneficiary designations in retirement plans or life insurance policies are the most frequent gift types reported by gift planners. According to the survey, the most common types of planned gifts among legacy society members were:

- Bequests (wills or living trusts): 34.2%
- Beneficiary designations (retirement or life insurance): 26%
- Charitable remainder trusts: 21.8%
- Charitable gift annuities: 14.5%
- Donor advised funds: 14.5%
- Other:
 - Real estate and/or life estate reserved: 2%
 - Qualified charitable distributions: 1%

These findings reinforce the value of offering a range of giving options. With a variety of gift options, nonprofits can meet donors where they are, both in terms of financial complexity and philanthropic intent. The results show that donors appreciate straightforward choices, which can be prominently featured in communications and online materials. More complex gift vehicles, such as charitable remainder trusts or donor-advised funds have also gained traction with donors.

Crescendo's donor proposal software and marketing packages, explain these concepts in donor-friendly terms, making sophisticated planning strategies more accessible to everyday donors.

“Through Crescendo and our in-team marketing specialist, we are able to use a multi-pronged communications strategy... to educate prospective donors about the impact that can be made through a planned gift.” Kyle Paige, Managing Executive Director, Estate and Gift Planning, University of Miami

Benefits of Joining a Legacy Society

Joining a legacy society often leads to deeper, more meaningful donor engagement. Survey results indicate that for many nonprofits, this connection goes beyond the future value of a planned gift. Many organizations report increases in annual giving, stronger donor satisfaction, more frequent event participation, new donor referrals and greater volunteer involvement.

Legacy gifts solidify a donor's intent and affinity for an organization. Many respondents (33%) reported that legacy society members increased their annual giving. After making a long-term commitment, donors frequently choose to expand their support to the present as well.

Many legacy society members increase their involvement over time. According to the survey, 26.1% of organizations reported greater donor satisfaction and a stronger connection to the mission after donors joined their legacy society. Deeper connection also took the form of increased participation at events (20.6%), while 13.9% reported that legacy donors referred new potential supporters. In addition, 10.7% of respondents observed more volunteer involvement, suggesting that a legacy gift may lead to broader engagement across the organization.

However, not all organizations reported a noticeable change. Approximately 14.9% indicated no significant shift in donor behavior following enrollment in the legacy society. The overall trend remains clear: when donors are recognized and included in meaningful ways, their connection to the organization often strengthens. Legacy giving is not only a commitment to the future, but also an important opportunity to cultivate deeper relationships today and may influence ongoing giving behaviors.

“Our goal is to create more personalized, impact-driven experiences that honor both current and future commitments. We've found that when donors see the tangible results of their giving today and how their planned gifts can amplify that impact it opens the door to deeper, lasting engagement.” Lauren Schlesinger, Marketing and Stewardship Coordinator, The University of Georgia

Donor Giving Trends After Joining a Legacy Society

Legacy gifts often strengthen donor relationships, not just in commitment but also in giving behavior. When asked about giving patterns following enrollment in a legacy society, organizations shared a range of outcomes. Some saw upward momentum over time: 18.2% of respondents reported that giving increased steadily over

multiple years, suggesting that the act of joining a legacy society may reinforce a donor's long-term commitment.

Others reported an initial surge in generosity. In 10.4% of cases, giving spiked early on and then leveled off into reliable ongoing support. For nearly a quarter of respondents (23.4%), giving remained consistent, with legacy society members continuing to give at the same levels they had prior to joining.

Only a small cohort (1.9%) noted a decline in giving, demonstrating that decreased financial support after enrollment is relatively rare. A large number of respondents (46.1%) were either unsure or unable to report on giving trends. This uncertainty may reflect gaps in tracking systems, limited access to donor data or the relative newness of legacy programs. This finding also highlights room for improvement in reporting and tracking gifts.

Overall, the findings underscore a valuable insight: legacy giving and annual giving are intertwined. Most legacy donors continue, and in some cases increase their support after making a planned gift. By fostering strong relationships and consistent stewardship, organizations can cultivate not only future gifts, but also deeper and more sustained current engagement.

“Legacy societies are relatively cost-effective ways to steward many of our best donors. Our modest legacy society luncheon resulted in at least \$3.5 million in newly documented bequest intentions.” Frank Bernal, CAP®, CSPG, Senior Director, Planned Giving, Providence St. Jude Memorial Foundation

The Value of Providing Bequest Language

Bequests remain the most popular planned gift option. Providing sample bequest language is a high impact strategy that reduces barriers for donors. It reduces uncertainty and helps donors take decisive next steps. Most organizations that offer sample language have reported (71.7%) that new gifts result from this resource, either as a direct relation or a possible correlation.

According to the survey, organizations that include sample language often see tangible results. In the survey, 31.5% of respondents reported that offering bequest language directly led to new legacy gifts, showing a strong connection between accessible resources and donor action. Another 40.2% indicated that it may have influenced gifts, even if the correlation was not always clearly documented. In contrast, only 7.5% of organizations reported no observed impact. A small number of respondents (8.2%) acknowledged that they do not offer sample language at all.

The results suggest that including sample bequest language in multichannel messages and websites is a low cost, high reward tactic. Including sample bequest wording on your website, in brochures and donor communications can streamline the process, making planned giving more accessible. By proactively offering bequest language, donors become aware that your organization is equipped and ready to handle these types of gifts. Consider offering bequest language to donors and implement tracking measures. This strategy is attainable and may create significant results for the nonprofit.

“Legacy society membership has strengthened donor relationships by fostering deeper, more personal connections rooted in shared values and long-term impact. Donors who include our organization in their estate plans often become more engaged, loyal and invested, seeing themselves as true partners in our mission.” Kara Fulmer, Director of Planned Giving & Grants, The Honeywell Foundation, Inc.

Crescendo Interactive: Tools That Power Legacy Success

Crescendo's digital tools help you meet donors where they are, whether online, by phone or in person. Crescendo's platform offers a branded gift planning website, targeted surveys, personalized donor proposals, donor education and legacy society management. Multichannel education, which includes enewsletters, seminars, thank you calls, correlates with higher response and conversion rates.

The latest advancements in technology have enhanced rather than replaced the relationship building between donors and nonprofit organizations by automating the branding of promotional materials. Crescendo has the tools to help map out your marketing plans and ensure your donors receive positive and welcoming messages.

Crescendo's Tools and Services That Drive Success:

- **Custom Websites:** Custom branded legacy websites educate and inspire donors to consider planned giving with user-friendly, customized content.
- **Email Campaigns and Feedback:** Email campaigns and donor surveys identify interested prospects and steward current donors with automated outreach tools such as CresCoaching and CresSurvey.
- **Personalized Language:** CresPro donor proposals help gift planners create personalized proposals and sample language efficiently.
- **Analytics:** Analytics and lead scoring prioritize outreach based on donor behavior, survey responses and interest signals.

Turning Data Into Action: Recommendations for Charitable Gift Planners

Gift planning is a dynamic area. As such, it is important to regularly assess and evaluate your organization's strategies. Some practical steps and areas you should consider elevating your legacy society and giving outreach include:

Audit your current legacy society. Take steps to actively steward current members. Consider your efforts to promote membership and bring interested donors into the legacy society.

Launch or update a donor survey. A well-designed digital survey can reveal planned gift intentions and warm leads.

- **Collaborate with advisors.** Build referral networks with estate attorneys and financial advisors. Host an estate planning seminar or a lunch and learn event.
- **Measure and report.** Regularly track the number of documented legacy donors, new leads and bequest notifications. Share wins with your leadership and board.
- **Review and review and review some more.** Assess your organization's current planned giving outreach and adjust as needed.
- **Leverage teamwork.** Engage your board and partner with advisors to promote legacy conversations.

Conclusion Legacy giving is about shared values and long-term impact. Legacy societies help make that impact visible, durable and deeply personal.

For gift planners and advisors, this represents a powerful opportunity. When donors are educated, engaged and honored, they respond with generosity. With the right mix of strategy, communication and Crescendo Interactive's tools, your legacy society can become one of your organization's greatest strengths.



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