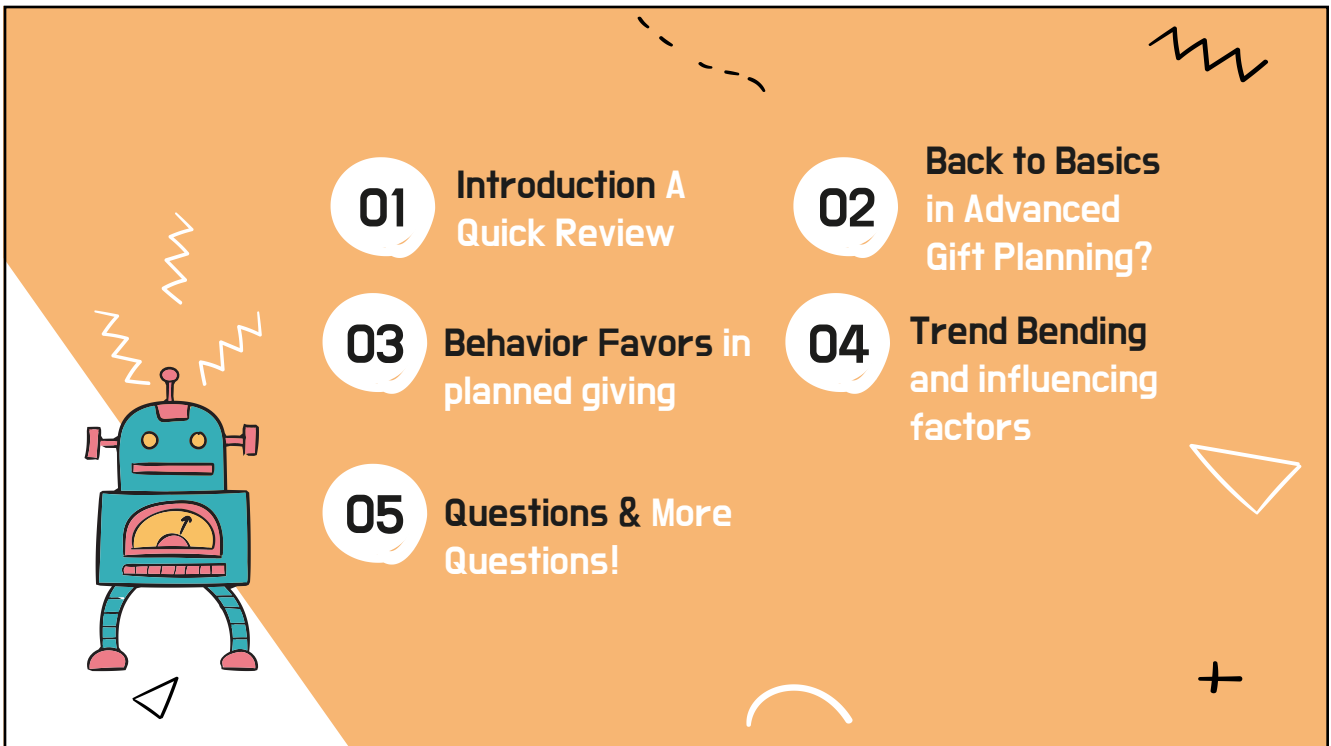




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But First!

Is AI coming for our jobs?

- Will this put fundraisers out of work?
- What will happen to nonprofits?
- How will donors adapt?



3

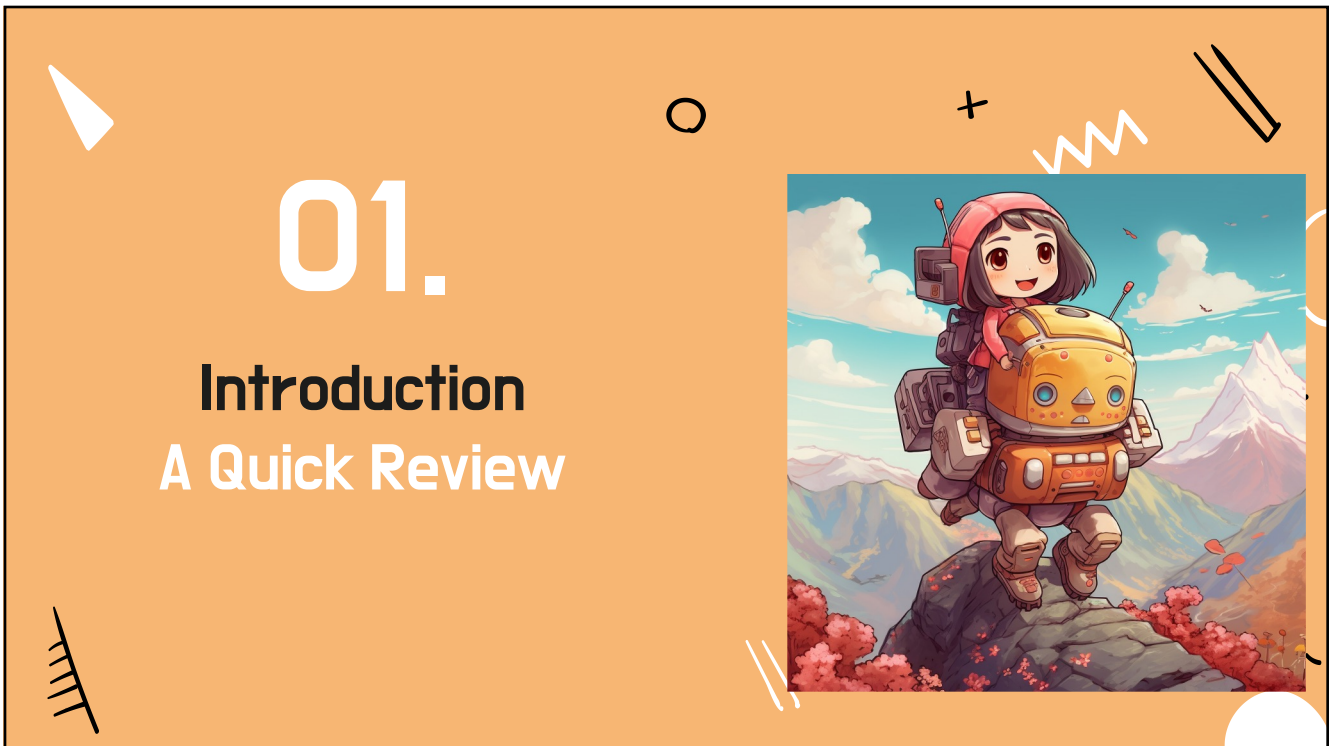
“I think what makes AI different from other technologies is that it’s going to bring humans and machines closer together. AI is sometimes incorrectly framed as machines replacing humans. It’s not about machines replacing humans, **but machines augmenting humans**. Humans and machines have different relative strengths and weaknesses, and it’s about the combination of these two that will allow human intents and business process to scale 10x, 100x, and beyond that in the coming years.”

—Robin Bordoli, ex-CEO, Figure Eight

4



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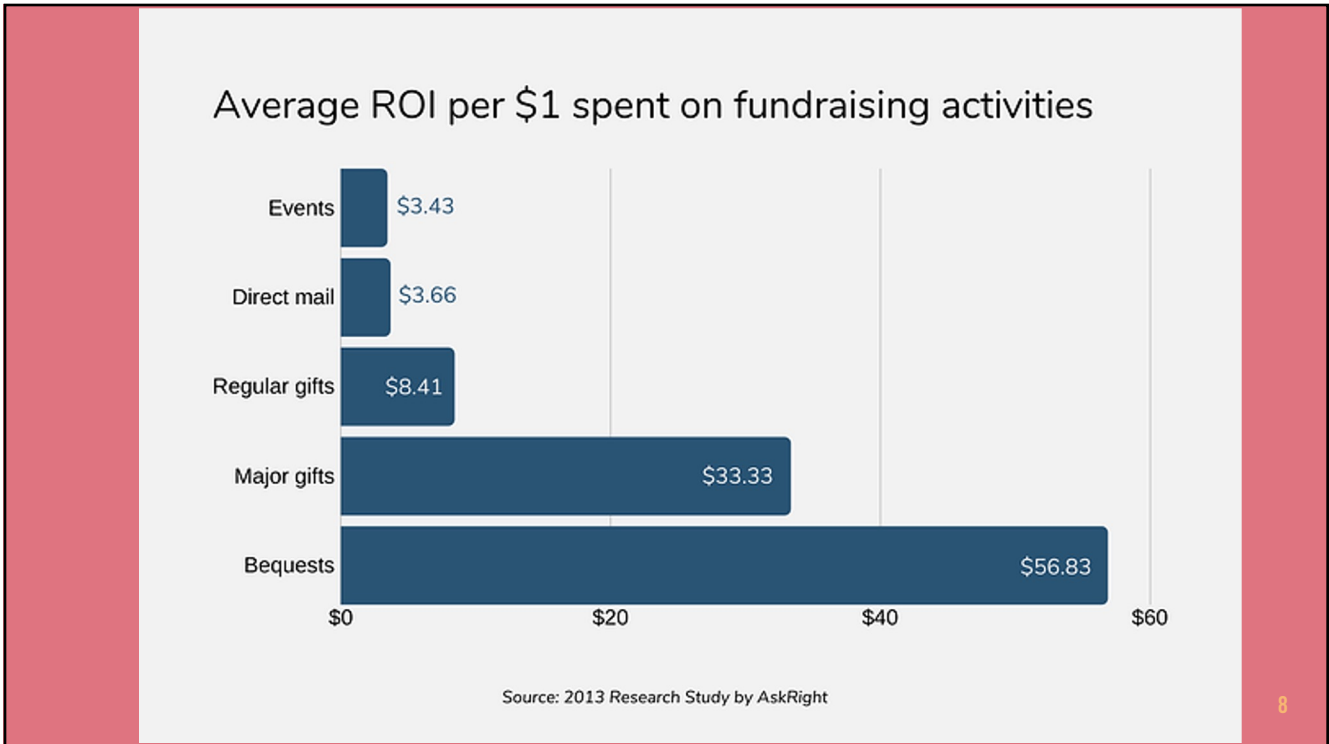


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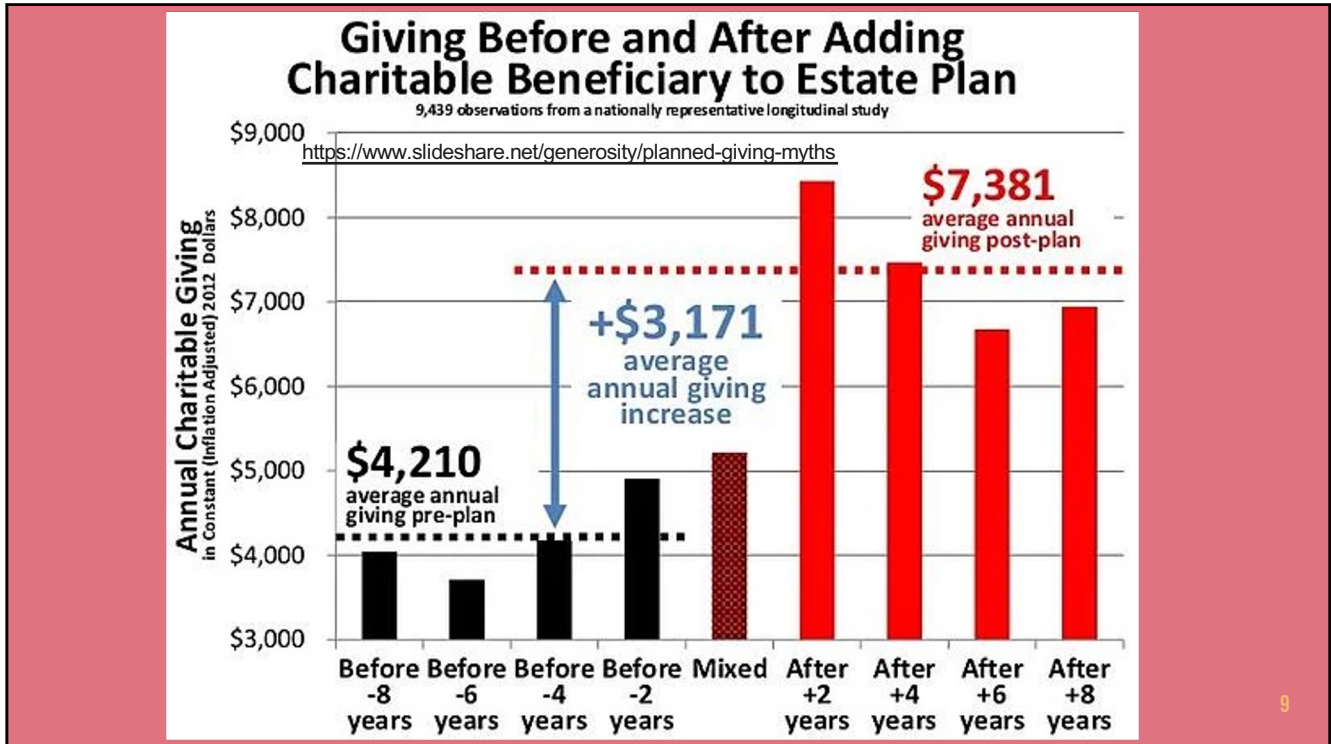
\$68 Trillion

Will change hands in the next 25 years, with a significant portion going to charitable causes.
(Source: [Cerulli Associates](#))

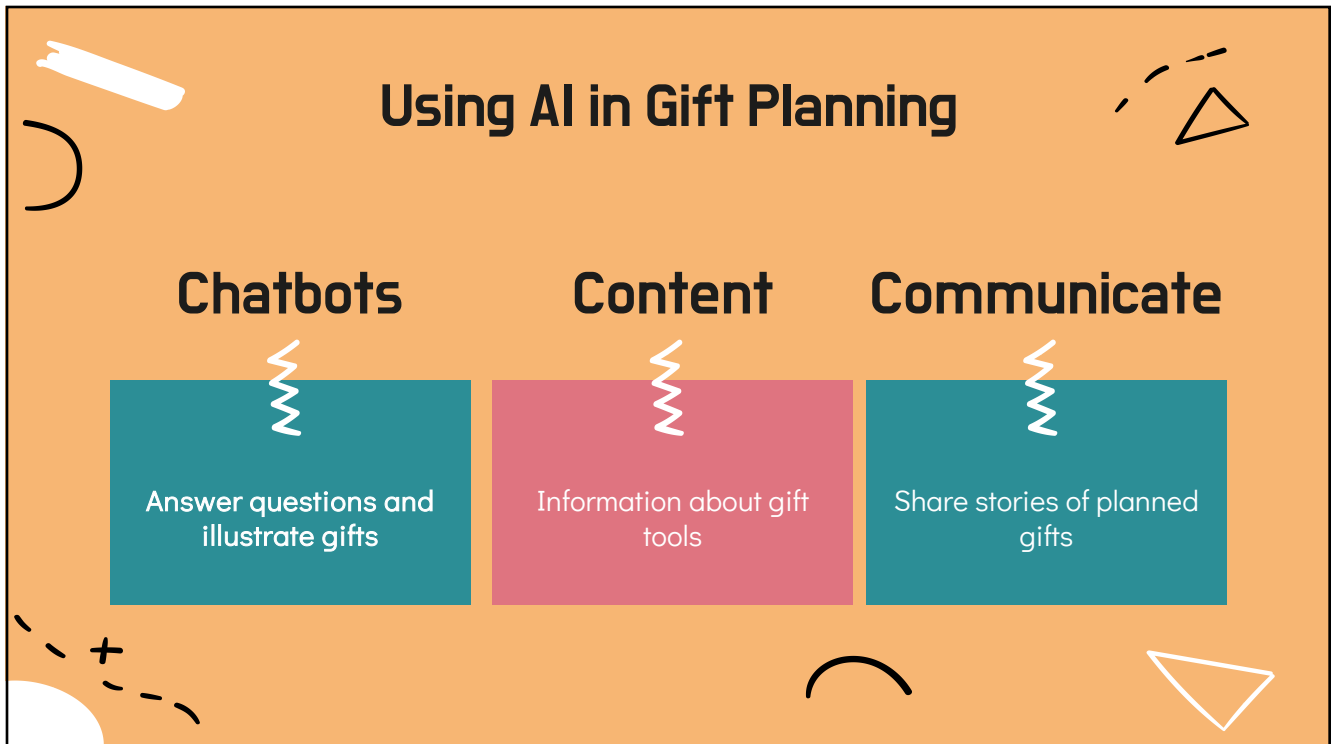
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12




Core Concepts




- **Foundation to Finesse:** The journey from making a basic bequest in a will to crafting sophisticated financial structures to maximize giving and benefits.
- **Diverse Giving:** Encourage donors to explore beyond simple cash donations. Assets, securities, and more can be part of their giving portfolio.
- **Smarter Ways to Give:** People gain a deeper sense of satisfaction when they feel they've made a smart decision. By diversifying their giving methods, donors can satisfy both their emotional need to give and their rational need for financial prudence.
- **Donor Segmentation Tools:** AI can analyze donor databases to categorize individuals based on their giving capacities and patterns, suggesting tailored outreach strategies.

13





Points for home



Be Transparent: Clearly convey the benefits and processes of gift planning.

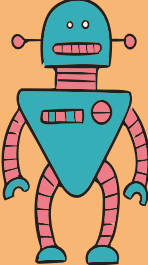
Personal Touch: Even while leveraging AI, ensure personal connections are maintained. Pair technology with the human touch.

Stay Updated: As the landscape of philanthropy shifts, continually refresh strategies, using AI tools to ensure you're always one step ahead.

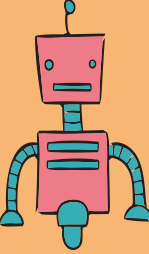



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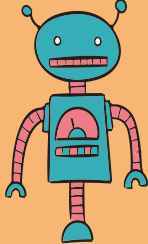
Advanced tools



**Charitable
Remainder Trusts**



**Charitable Lead
Trusts**



Business Exits

15

What Are Philanthropic Business Exits?

- A business exit strategy involves selling ownership to another company or investors
- Philanthropic business exits allocate a portion of proceeds or assets to charitable causes
- References:
 - [Entrepreneurs as Philanthropists](#) (Fidelity)
 - [Selling a Business](#) (US Bank)

16

Why Discuss Philanthropic Business Exits?

- Structured exits offer tax advantages, reducing capital gains and estate taxes
- Leaving a lasting impact on causes, ensuring life's work benefits society
- Deepen cause-client relationship, leading to trust and long-term engagement
- Data Point: 66% of business owners donate a portion to charity

17

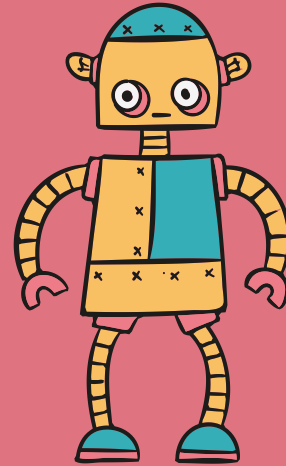
When to Engage in Philanthropic Conversation?

- Introduce idea during discussions of long-term business goals
- Discuss wealth allocation during business valuation
- Integrate philanthropic goals into pre-exit planning
- Finalize philanthropic commitments in post-exit reflection

18

Utilizing AI

- **Donor Match Algorithms:** Use AI to sift through donor databases, identifying individuals most likely to be receptive to advanced strategies based on age, financial status, and donation history.
- **Communication Tailoring Tools:** AI-driven platforms can craft personalized pitches for potential advanced gift donors, emphasizing both charitable impact and benefits to their lineage.
- **Predictive Analytics:** AI tools can evaluate donor profiles to identify ideal advanced giving candidates based on financial status and previous giving patterns.



19

Points for home

Educate and Empower: Use seminars, webinars, and AI-driven tools to demystify these techniques and their benefits.

Testimonials Triumph: Share stories of donors who've utilized these techniques, allowing prospects to visualize their journey. Use AI to repurpose stories and provide an omnichannel approach.

Continuous Learning: The landscape of gift planning keeps evolving. Use AI tools to stay updated with latest trends and adjust strategies accordingly.

20

03.

**Behavior Favors in
planned giving**

21

**The Brain and
Philanthropy**

Neuroimaging studies reveal the brain areas activated when thinking about charitable acts.

Legacy and the Brain

When people contemplate their legacy, they're more inclined towards charitable actions.

22

James' Brain Frames

Research & Findings

W W W

According to Dr. James' studies, certain regions of the brain associated with pleasure and reward light up when individuals think about posthumous giving. This suggests a deep-rooted satisfaction in legacy giving.

Behavioral Science Insights

W W W

Our subconscious plays a huge role in decision-making. Tapping into the emotional and cognitive satisfaction of legacy can significantly boost planned giving.

23

Dual Drives

Z

While the emotional drive propels donors to consider giving, logical aspects cement the decision. The dual-process theory in psychology highlights that humans rely on both emotional and logical processes in decision-making. Charitable acts often start as an emotional impulse but are solidified with logical incentives

Striking a Balance

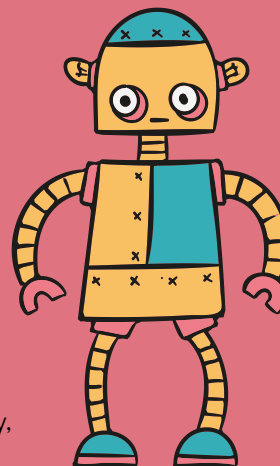
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For effective gift planning, nonprofits need to address both the heart and the head. Emotions drive initial interest, but it's often the logical, tangible benefits (like tax breaks) that convert this interest into action.

24

Utilizing AI

- **Sentiment Analysis Tools:** AI can analyze donor communications to gauge their sentiment towards legacy, helping tailor and optimize messaging that resonates on a deeper level.
- **Personalized AI Recommendations:** AI tools can offer tailored suggestions on how to approach donors, deciding when to pull emotional levers and when to push logical buttons
- **Gift Insight Tools:** AI-driven data analysis can provide insights into specific preferences and tendencies related to philanthropy, ensuring that outreach is resonant and respectful.



25

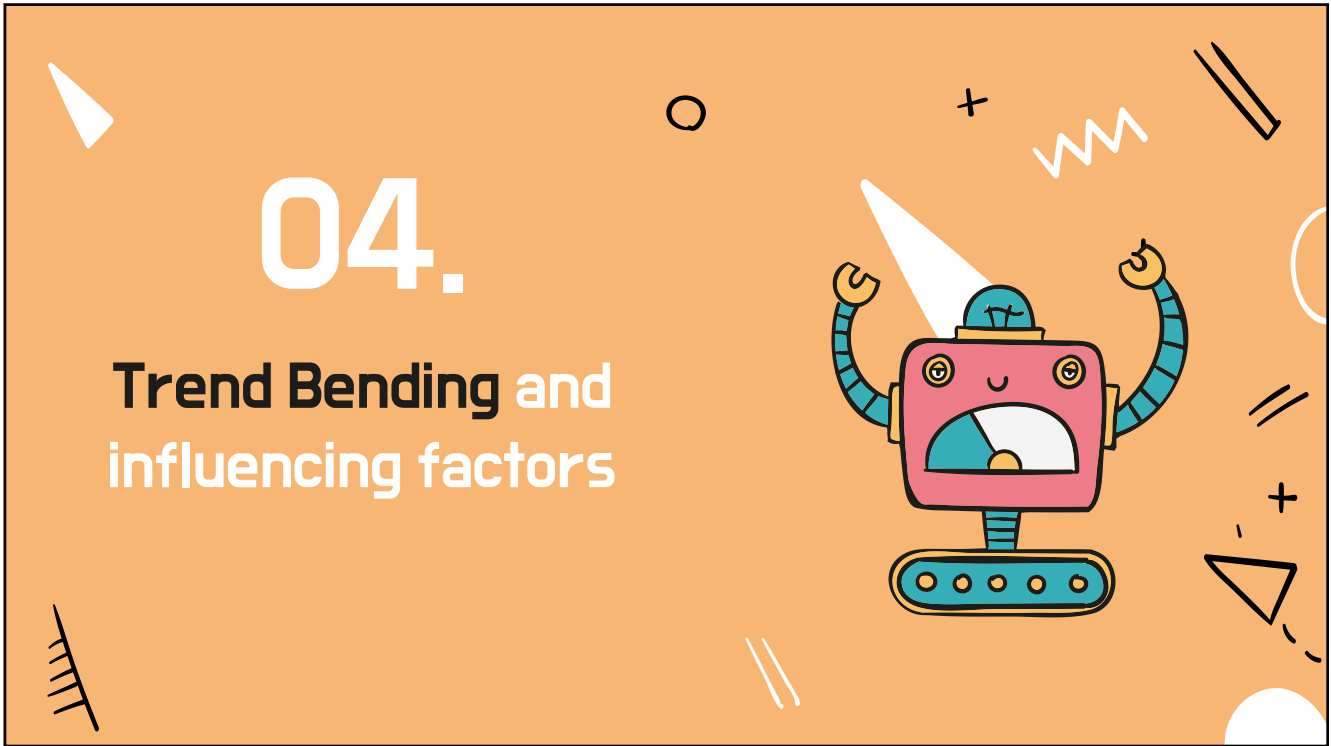
Points for home

Deep Dive into Data: Use AI tools to analyze donor data, uncovering behavioral and giving trends.

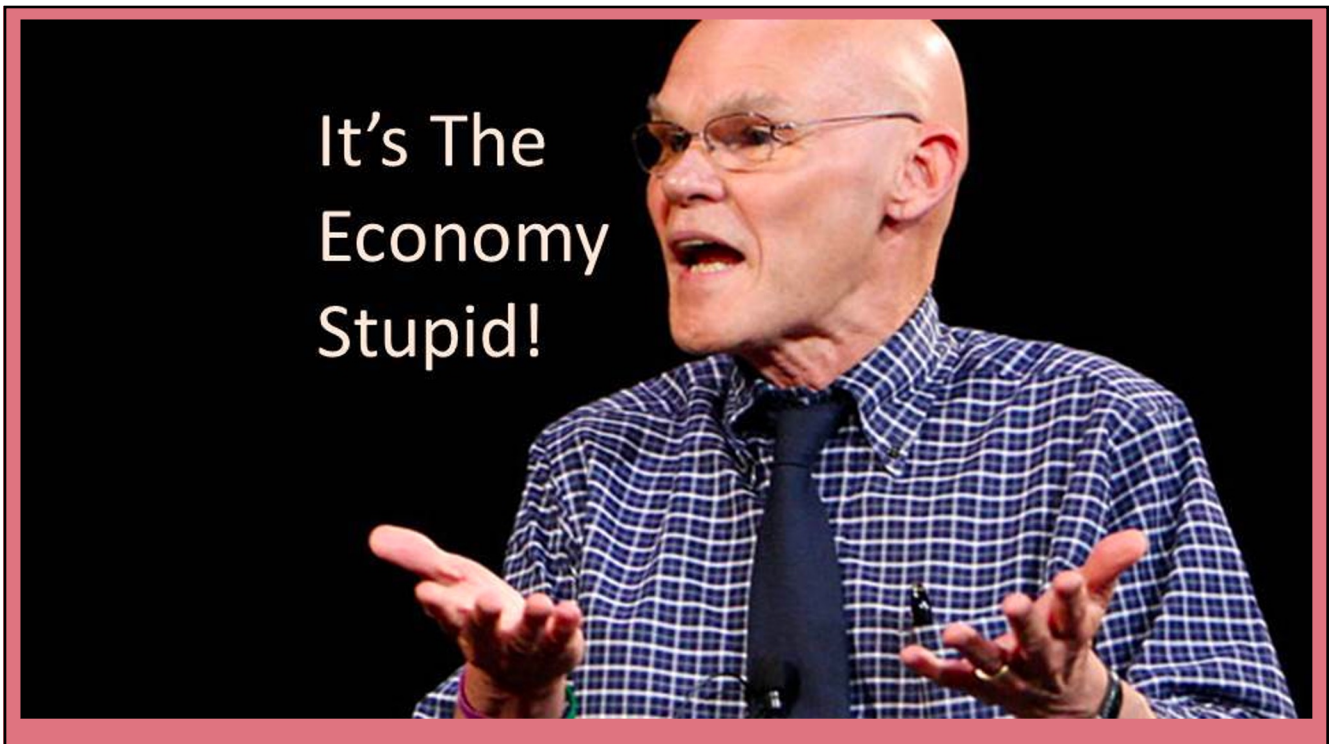
Storytelling with Sensitivity: Craft narratives that resonate emotionally, but back them with solid logical benefits.

Advanced Gift Training: Educate teams on giving nuances in philanthropy, ensuring that all interactions are respectful and informed. Always involve other seasoned professionals and get the next meeting!

26



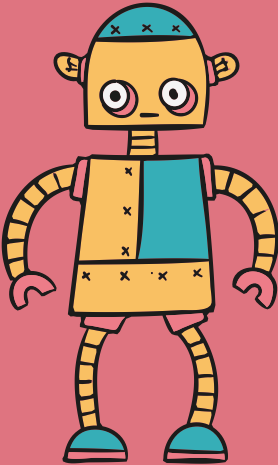
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28

Problem: Economic Uncertainty

- Financial Harmony: How economic booms and downturns impact philanthropic tendencies.
- Tuning into the Economic Rhythms: Adapting strategies in response to the global and local financial landscapes.



29

Research & Findings

As highlighted by *The Philanthropic Pulse*, donations tend to increase during economic booms and contract during recessions. However, planned gifts often remain steady, showing resilience against economic fluctuations.

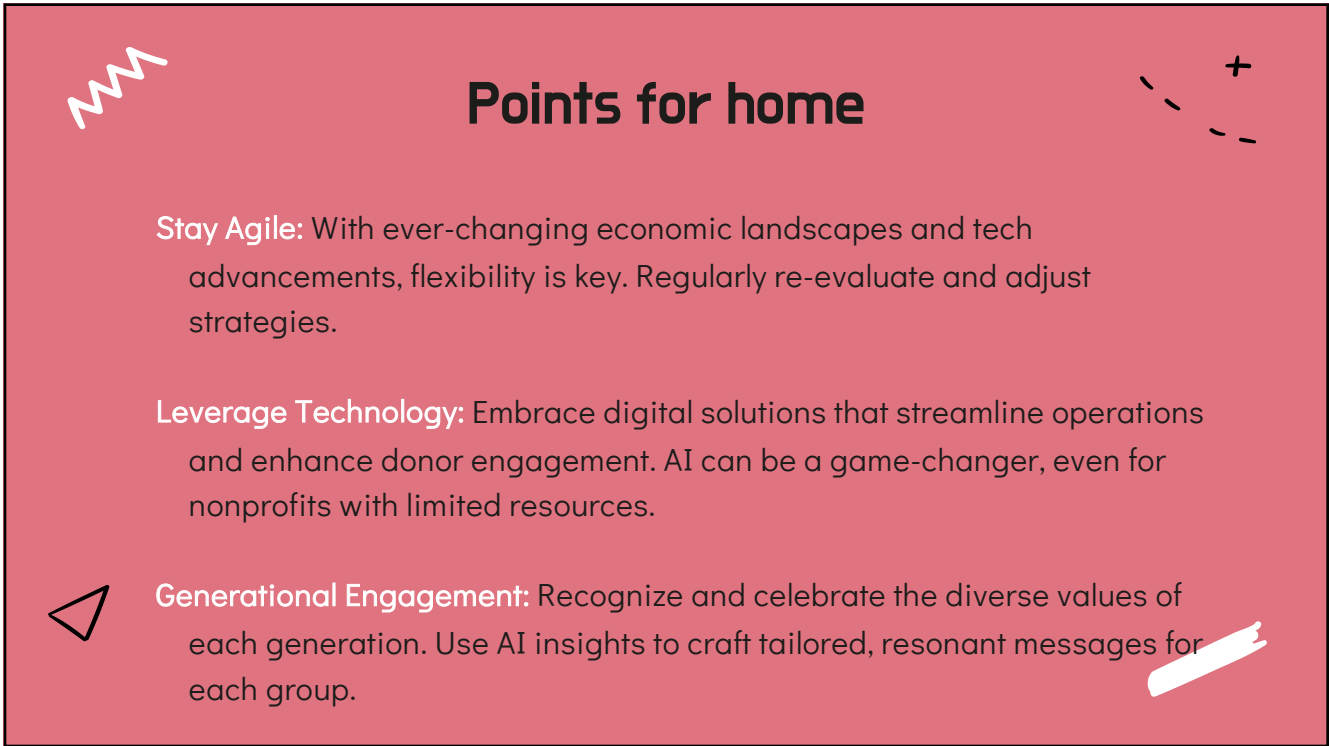
Behavioral Science Insights

Financial security influences charitable giving. When economic conditions are robust, there's an uptick in immediate gifts. In more volatile times, people lean towards structured giving that offers personal financial benefits.

30



<p>Research & Findings</p> <p>Decoding Generational Values: Each generation, from Boomers to Gen Z, has its unique philanthropic inclinations and preferences.</p> <p>Building Bridges: How to craft messages that resonate with each demographic.</p>	<p>Behavioral Science Insights</p> <p>Generational values are shaped by societal events during formative years. Understanding these pivotal moments and their impact can lead to deeper connections with each age group.</p>
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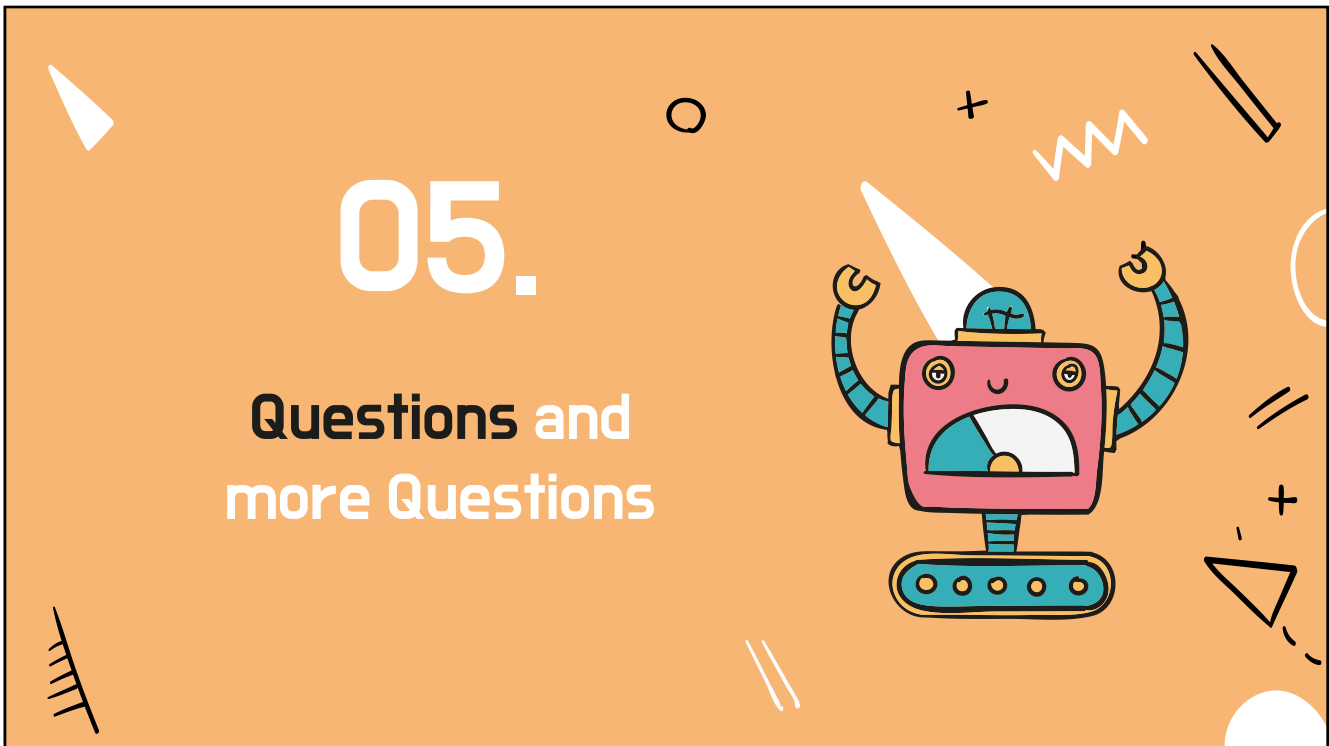
Points for home

Stay Agile: With ever-changing economic landscapes and tech advancements, flexibility is key. Regularly re-evaluate and adjust strategies.

Leverage Technology: Embrace digital solutions that streamline operations and enhance donor engagement. AI can be a game-changer, even for nonprofits with limited resources.

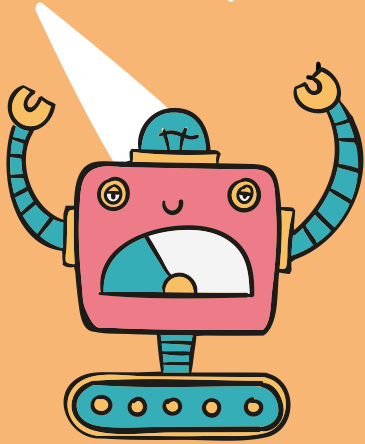
Generational Engagement: Recognize and celebrate the diverse values of each generation. Use AI insights to craft tailored, resonant messages for each group.

33



05.

Questions and more Questions




34

More than two-thirds (67 per cent) of U.S. office workers feel they are constantly doing the same tasks over and over again. On average, respondents say they waste four-and-a-half hours a week on tasks they think could be automated.

The top tasks global workers would like to automate include:

- emails (60%)
- inputting data/creating datasets (59%)
- scheduling calls and meetings (57%)



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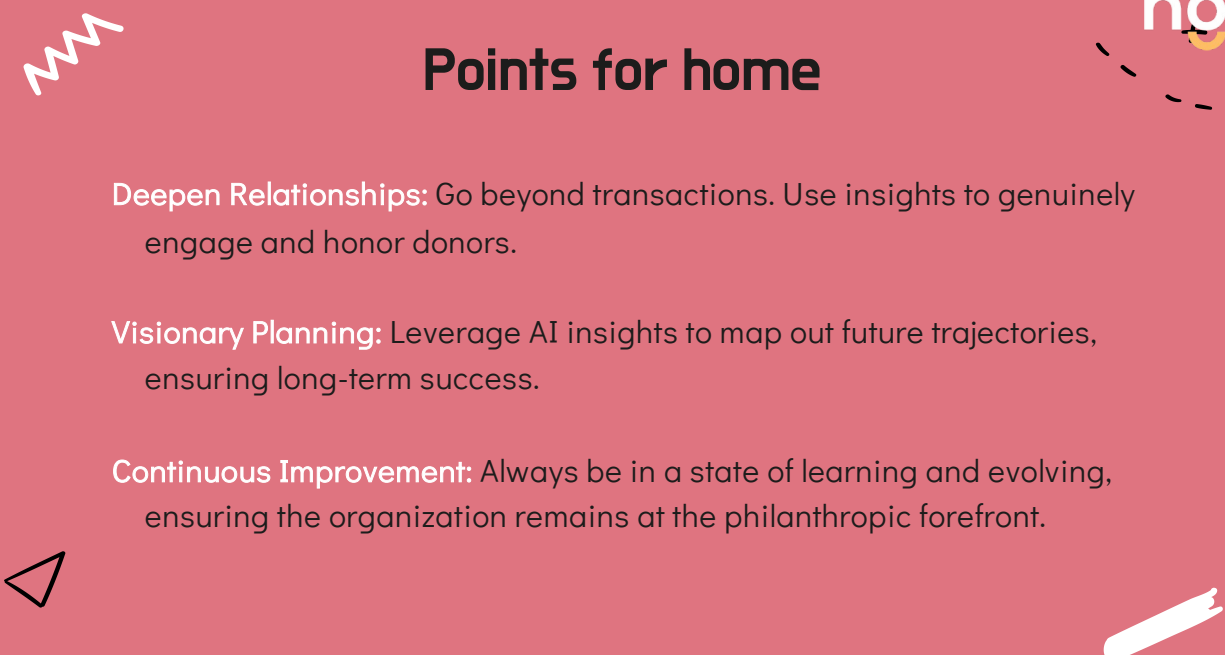
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Points for home

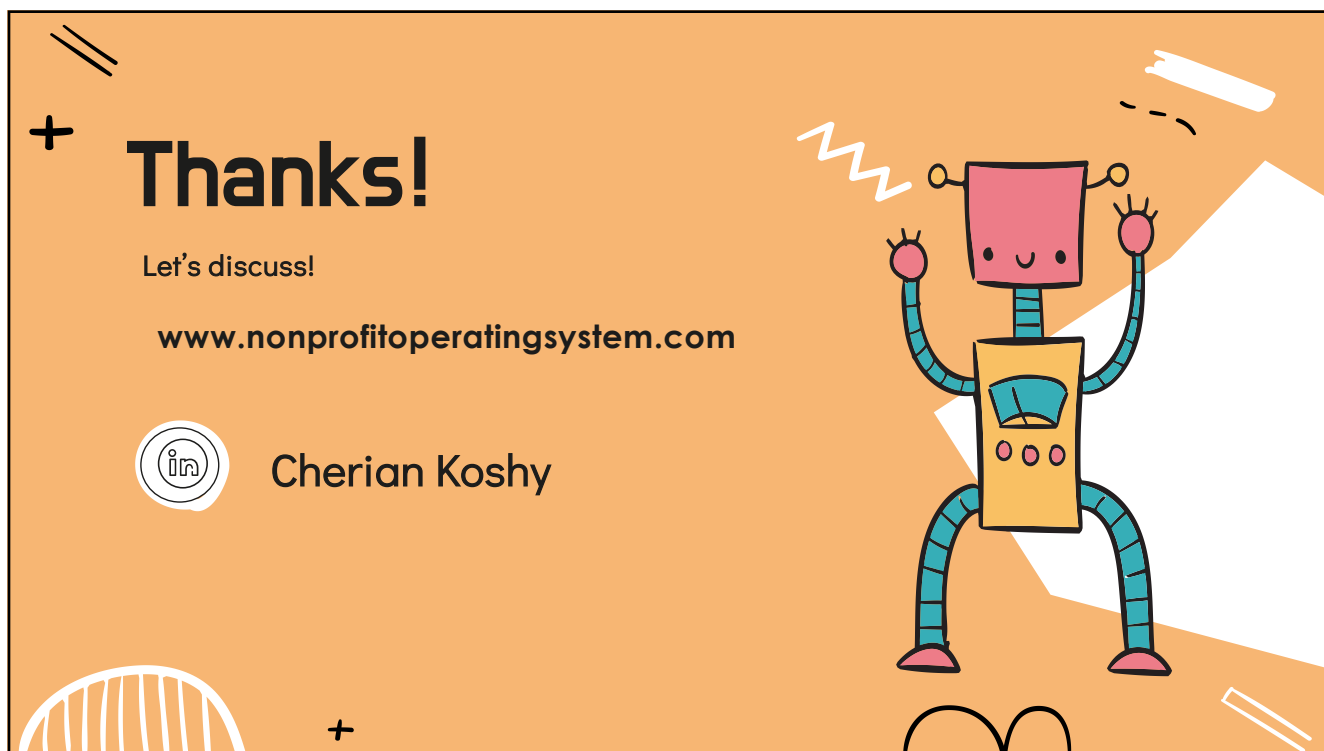
Deepen Relationships: Go beyond transactions. Use insights to genuinely engage and honor donors.

Visionary Planning: Leverage AI insights to map out future trajectories, ensuring long-term success.

Continuous Improvement: Always be in a state of learning and evolving, ensuring the organization remains at the philanthropic forefront.



36



Hands-On AI for Advanced Gift Planning Workshop

Welcome and Introduction

- Workshop objectives and expected outcomes

Individual Planned Giving Donor Strategies

- Access individual giving data here ([link](#))
- Access tool here ([link](#))

Crafting Personalized Outreach Messages (30 minutes)

- Individual activity: Create AI-generated individual proposal, stewardship strategy, and materials
- Share outputs in small groups and discuss the effectiveness of AI-generated content

Segmented Group Strategies (30 minutes)

- Access sample database giving data here ([link](#))
- Access tool here ([link](#))

Identifying Segmented Gift Prospects

- Individual activity: Create AI-generated strategies for potential planned giving donors and stewardship strategies for existing planned giving donors
- Present findings and discuss potential impact on gift planning efforts

Reflection and Next Steps

- Recap of hands-on activities and key learnings
- Develop an action plan for implementing AI in your organization
- Explore resources for further learning and adoption of AI in gift planning