



AREA AGENCY ON AGING OF PASCO-PINELLAS, INC.

POLICY: PLANNED GIVING PLAN

DEPARTMENT: DEVELOPMENT

DATE DEVELOPED: 03/02/2026

PROGRAM: FUNDING

DATE APPROVED: 08/17/2026

PURPOSE:

To develop a plan in order to cultivate and secure major gifts as well as planned giving avenues for donors to support the mission of AAAPP. Planned gifts create unrestricted, long-term support that protects the organization through economic uncertainty and ensures services for future generations of seniors.

Year one Priorities:

- Launch planned giving information on new website
- Host Kick-off event – May 8, 2026 – Estate Planning 101
- Develop simple bequest language
 - o Include in email signatures and on other marketing collateral
- Identify 5 top legacy prospects
- Establish a Legacy Society

Initial Gift Types to Promote:

- Bequests
- Beneficiary Designations
- DAF successor gifts

Target Audience:

- Donors 60+
- 3+ year loyal donors
- Major donors
- Former board members
- Long-time volunteers

Role of AAAPP Board:

- Consider including AAAPP in personal estate plans
- Assist with identifying 1-3 prospects annually
- Support introduction to professional advisors
- Participate in stewardship



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- Attend special events focusing on planned giving opportunities

Goal: 100% board engagement in some form.

Cultivation Activities:

- 1:1 coffee or lunch
- Personal impact reports
- Calls from ED
- Handwritten notes
- Invitations to volunteer events/mission in action – If interested

Moves Management:

- Identify Program(s) of interest
- Estimated capacity (use Bloomerang wealth screening tool)
- Giving history to AAAPP
- Invite to all stewardship/Planned Giving/informational/educational events
- Compile historical impact data to share with donors screened for capacity to leave a planned gift
- Provide planned giving materials
 - o Bequest language
 - o Planned giving flyer
 - o List of ways to give

*Caveat with recommending they seek personal legal and financial advice

Stewardship:

- Thank you letter – Welcome to legacy society if AAAPP chooses to develop and name a legacy/giving society.
- Quarterly or bi-annual impact report for program designation
- Invitation to small gatherings (i.e. Estate planning 101 event or similar style event – day in the life etc.)
- Year-end impact story



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- Depending on the impact of the gift – explore naming opportunities with the donor should they request it.