

TOP MARKETING TIPS FOR

FAITH-BASED ORGANIZATIONS



Crescendo

Major & Planned Gifts Marketing

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FAITH-BASED ORGANIZATIONS



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Major & Planned Gifts Marketing

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This booklet explores effective multichannel marketing strategies for faith-based organizations. By utilizing a range of communication channels, organizations can reach diverse audiences, increase engagement and enhance donor relationships. The following examples highlight successful approaches that can strengthen your gift planning initiatives and drive meaningful support.

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INTRODUCTION

Your mission is unique and unlike that of any other nonprofit. Your donors are also special and they support your cause for reasons that are real and personal to them.

You will want to appeal to your donors with marketing that reflects what your organization is doing today and where it is going in the future.

Crescendo will provide you with time-tested marketing concepts that can be customized to help your organization achieve its unique mission.



All of the effective marketing examples in this booklet were created using Crescendo's GiftLegacy Pro subscription with minimal time and effort. If you have questions or need help with your marketing, please contact us. Crescendo can help you develop a strategy that is right for your organization.

A strong online presence is crucial for the success of your organization's gift planning marketing. The goal is to engage your donors and motivate them to support your mission.

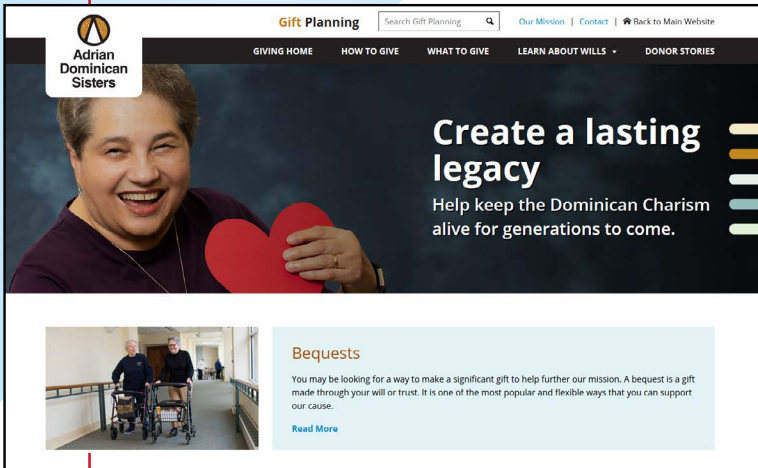
Along with your organization's branding, your website can feature articles, videos and donor stories that educate donors about ways to support your cause. Your website also needs to be mobile-friendly so that you can reach more visitors who are using all types of devices.

Best practices for an impactful website to market to your donors:

- ▲ **Use custom images that tell a story.** Show your organization's mission in action and positive impact through your donors' loyal giving efforts.
- ▲ **Create a focused experience.** We recommend a focused gift planning experience for your website visitors. When visiting your branded gift planning website, donors can learn how to give and what to give. Interactive features such as donor benefits calculators and a complimentary wills planner enhance their experience. Mission-related photos and heartfelt stories from donors show generosity benefits and rewards. We include a "Back to Main Website" link so users can easily navigate back to the parent website.
- ▲ **Show the most important topics on the homepage.** This is especially important if you have a campaign focused on a specific gift. This will create entry points for your donors to focus on the pages you want them to visit.
- ▲ **Be consistent with your branding.** You want your visitors to recognize your organization's branding colors and logo on your gift planning website. Create a unified experience for your donors, ensuring a seamless experience between the main website and the gift planning website.
- ▲ **Use content that is readable and easy to follow.** We recommend short paragraphs, headlines and bullet points to make it easy to read and scan your page.
- ▲ **Make clear and concise "call-to-action" words and phrases.** Customize your text to support your mission. This will inspire your donors to take action.

WEBSITE EXAMPLES

Here are examples of strong websites for faith-based organizations:



Adrian Dominican Sisters

showcases a user-friendly layout with imagery and brief gift descriptions that make it easy for users to read.

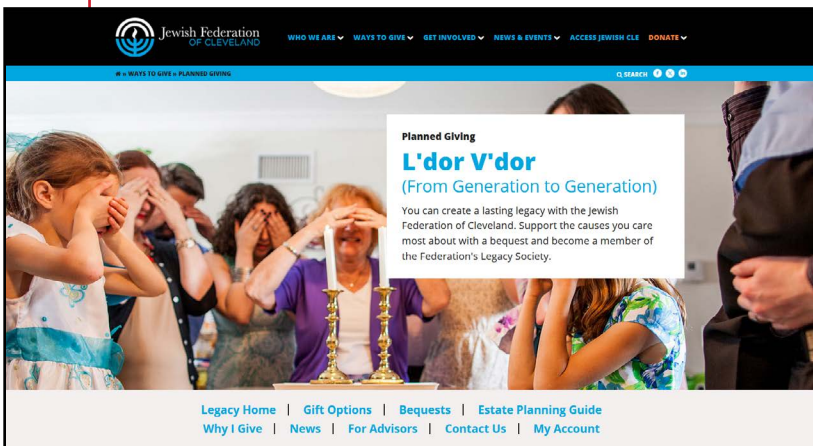
Global Christian Relief's

website layout is visually appealing with a catchy headline and compelling mission-oriented images.



Jewish Federation of Cleveland

incorporates their faith and values with a message that immediately connects donors to the importance of legacy and continuity.



Create Your Jewish Legacy

Our legacy donors are the lifeline of this community. Because of their vision, we are in a position of strength today. As community dynamics shift, we are prepared for whatever is ahead of us. We are able to weather the ups and downs of the economy without compromising services to those in need. We are able to support innovation in programming to reach more people and offer help when and where it is required. When there is crisis, we are able to respond locally and globally. If you have already made the Federation part of your estate plan, or would like more information on how to do so, [please contact us](#). We look forward to talking with you.

COMPELLING EMAIL MESSAGING

Email is one of the best ways to maintain regular contact with your supporters. Effective emails use catchy subject lines that encourage readers to open them and learn more.

Enewsletters should be sent on a consistent basis to steward donor relationships. Your messaging needs to be compelling to promote donor response. In contrast, eblasts are shorter, visually appealing emails focused on specific topics. Both email formats are effective marketing tools to drive traffic to your gift planning website and engage your donors and prospects.



Best practices for using email messaging for your marketing:

- ▲ **Use custom images** that relate to your email messaging, including showing a specific funding or campaign need, a donor who contributed to your organization, a person or program that was directly impacted by a gift or a meaningful image that pulls on the heart strings of your donors.
- ▲ **Keep your branding consistent** with your organization's colors and logo to help your readers recognize the email is coming from your organization and not a third party. This builds trust with the donor and encourages engagement.
- ▲ **Include "call-to-action" words or phrases**, but keep them short and concise. Make it clear what you are asking of the donor, whether it is a financial gift, serving as a volunteer or ways they can contribute and serve the organization.
- ▲ **Add links to the gift planning website** and/or sign-up pages for upcoming events to make it more convenient for your readers to engage and act in a timely manner.
- ▲ **Focus your email messaging** on one clear topic to perform better. Too much information will overwhelm the reader, discouraging immediate action.

Popular Email Topics:

- ▲ Specific gift topic or campaign highlight
- ▲ Motivating donor stories
- ▲ Impact stories and testimonies
- ▲ Volunteer opportunities and spotlights
- ▲ Upcoming event and seminar invitations
- ▲ Updated news and recap of important events
- ▲ Estate Planning Guide offer to donors

EMAIL EXAMPLES

Here are examples of effective newsletter and eblast messaging for faith-based organizations:

Catholic Foundation of North Georgia's

PLANNED GIVING

About Bequests | Gift Options | Legacy Gift Notification

The Catholic Foundation is excited to announce a special opportunity for donors to increase the impact of their charitable giving: **anyone who opens a donor advised fund at the Catholic Foundation before November 15 can select an endowment fund* to receive a \$500 donation.**

What is a donor advised fund (DAF)?
A DAF is a philanthropic vehicle established by a donor (you) to make charitable contributions.

You receive immediate tax benefits and then recommend grants from the money in the fund to be distributed, over time, to charitable organizations.

The fund is invested and continues to grow, and additional donations can be added at any time.

A DAF could be right for you if you want to...

- Simplify your philanthropic giving and tax returns
- Be intentional about charitable giving involving the whole family
- Support local needs to support in the Catholic community
- Give with confidence with Catholic values
- Give with assistance in your upcoming

Catholic Foundation of North Georgia's

newsletter focuses on a specific gift model (donor advised funds) which helps supporters quickly and easily understand it without having to sort through extra information.

Jesuits Central and Southern's

newsletter strategically uses a "Plan by Your Life Stage" theme to engage their donors, highlighting giving opportunities based on the donor's age.

JESUITS
Central and Southern
Gift Planning

About Bequests | IRA Charitable Rollover | How to Give

Plan by Your Life Stage

ARE YOU UNDER 40?
With so much going on in your young life, possibly a new career, a new family, a new location, you might not be thinking about what to do about charitable donations or what to do with your accumulating assets, in the event you have already acquired assets. Your mind is focused on the here and now. But what would happen if you were suddenly hit by a drunk driver and died? You see the news. It happens every day, leaving children with just one parent or none at all. Protect the people and the causes you love with your first estate plan.

ARE YOU AGES 40-54?
You just thought you were busy 10 years ago! Today, your growing children are involved in scouts, ballet, soccer, baseball, Tai Kwan Do, music lessons, driving lessons and so much more! On top of that, your parents are aging too! First, be sure you have a will to cover the ones you love and what will happen to your property. If you have already been married and divorced (statistics say this applies to 50% of you!), be sure to update that will. Then, get your plans in order to protect your family and the charities you care about. I pray this includes the UCS Jesuits!

ARE YOU AGES 55-69?
Many people are looking forward to retirement, and retired at age 55! You may already be retired taken steps to ensure you will be able to thoroughly travel, to spend with grandchildren, to volunteer share your skills. It's not too late to speak with a leaving the Jesuits part or all of your estate? Join

ARE YOU OVER 70?
What legacy will you leave behind in this world? How are your retirement dollars working for you? Now is the time to be diligent about updating your will and updating your estate plans that put your loved ones first. This is the time to talk to your children about your choices if you have grown children. This is the time to rest and relax knowing you have done everything in your power to disseminate your wishes and assets to the people and charities who have loved you through the years.

PLANNING is the name of the game. Check out our website: [Planned Giving Home \(giftlegacy.com\)](#) We encourage you to seek out a financial planner you can trust. The information in this monthly column is not intended as legal advice. When you actually begin to PLAN your financial GIVING, please consult a licensed attorney.



How will YOUR story be told to future generations?
It's your legacy!

Happy Passover from YOUR Tidewater Jewish Foundation!

Scott Kaplan
President & CEO

Alvin Wall
Chairperson

Tidewater Jewish Foundation's

eblast includes a Passover celebration message that ties in the importance of leaving a legacy.

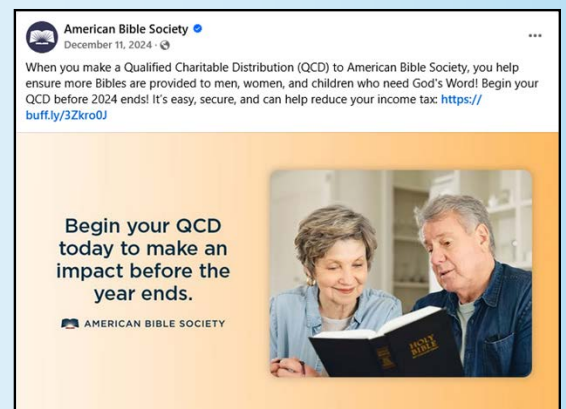
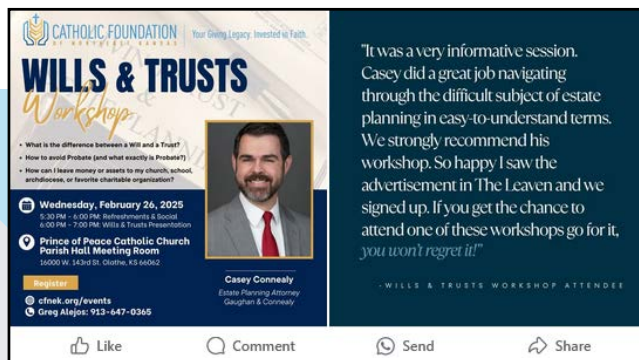
ENGAGING SOCIAL MEDIA POSTS

The goal of social media for a nonprofit is to engage and encourage supporters to rally behind your organization's cause. The best social media posts use imagery and video to capture attention, tug on donors' heartstrings and motivate supporters.

Many nonprofits share impact stories, mission-oriented images and videos, donor testimonials and snapshots of staff or beneficiaries.

Social media platforms allow nonprofits to go beyond their existing donor base to reach new supporters, volunteers and advocates. A single compelling post can be seen and even shared by thousands.

If you have a social media calendar, consider creating and scheduling regular posts about the work and mission of your organization.



Inspire action by blending your mission with heartfelt opportunities to give by highlighting the impact of every gift through compelling images and video stories.

EFFECTIVE PRINT MARKETING

Most nonprofits recognize the value of print marketing. Print is still important for introducing and reinforcing marketing messages. Coupled with electronic marketing, also known as multi-channel marketing, print is highly effective in reaching donors. Many organizations send smaller marketing pieces, such as postcards and inserts, that are effective and less expensive to print.

Traditional print marketing is often used as a follow-up method when a donor requests information on a particular gift topic. The Estate Planning Guide, which can be mailed, emailed or downloaded from your gift planning website, is the most popular print piece according to Crescendo's research.

Including QR codes in your print marketing is highly recommended because it bridges the gap between print and online engagement, making it easier for supporters to learn more and take action.

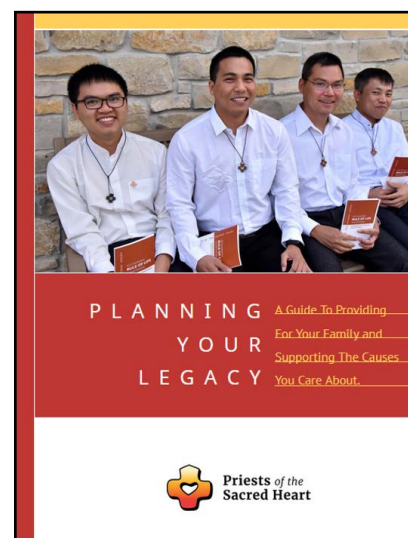


PRINT EXAMPLES

Here are some examples of effective print marketing for faith-based organizations:

Priests of the Sacred Heart's

customized Estate Planning Guide provides information for donors interested in leaving a gift in their will or trust to the organization.



PRINT EXAMPLES

Global Christian Relief

helps donors explore meaningful ways to give, making gift planning easier to understand and respond with their customized "Guide to Gift Planning" booklet. It is available as a downloadable PDF or as a printed booklet when conducting personal donor visits.



DO YOU EVER WONDER WHAT THE FUTURE HOLDS?

While it's impossible to know or control what happens in the future, you can achieve your ultimate goals by making a plan. Planning is one way to create a secure future for you and your loved ones. With a good plan, you can rest easy knowing that your family will be well cared for and your property will pass to your intended beneficiaries.

How Can We Help You?

- I would like to speak with someone who can provide additional information.
- I would like to sign up for your FREE newsletter.

Name: _____
 Street: _____
 City: _____
 State/Zip: _____
 Phone: _____
 E-mail: _____

This information is not intended as tax, legal or financial advice. Gift results may vary. Contact your personal financial advisor for information specific to your situation. Please complete and return. All inquiries are treated with complete confidentiality.

Please contact us for assistance in planning your future. We can help you create a plan to achieve your goals.

Sisters of St. Francis of Assisi, Inc.
 3221 E. Lake Dr., St. Francis, WI 53235-3702
 414-294-7329
 info@lakeside.org
 lakesidegiving.org

lakesidegiving.org

SUPPORT THE CAUSES YOU CARE ABOUT.

Sisters of St. Francis of Assisi

CHARITABLE BEQUEST

ization as a BA is another your cause. Your significant tax and possibly

grate our ardinary, we will eds of your gift, make this type of your plan. state your

accure documents. Also contact us to let us know how you would like your gift to be used.

CREATING YOUR PLAN IS EASY!

Contact us or visit our website to request a FREE guide to planning your estate. This fill-in-the-blank guide will help you organize your information before visiting your estate planning attorney.

With your estate's gift from your estate to our organization.

There are many reasons why you might consider making a charitable bequest.

This brochure is designed to provide the benefits of charitable bequest giving and also explain how a charitable beneficiary designation is made. Please contact us if you have any questions.

Decide on your gift.

A bequest to our organization can be a dollar amount, a specific asset (such as your home, artwork or coin collections) or a percentage (10% or 20%) of your estate. A bequest can also be made of the residue of your estate, or what remains after you have provided for your loved ones.

Give us a call.

We can provide you with sample language to share with your attorney as well as answer questions about your gift.

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Sisters of St. Francis of Assisi, Inc.'s

customized brochure includes custom images relating to the organization plus resourceful information about planned gifts.

Mercy Ships'

customized extended postcard focuses on ways donors can make an impact in the community by leaving a planned gift. A reply card is provided for easy response.

RETURN THIS CARD FOR MORE INFORMATION ON CREATING A CHARITABLE BEQUEST

The best way to contact me is by:

Email Mail Telephone

Please send information about creating a charitable bequest.

Other charitable tax planning options.

I have already included your organization in my estate plan.

Name: _____
 Street: _____
 City: _____
 State/Zip: _____
 Phone: _____

(All inquiries are treated with complete confidentiality.)
 This information is not intended as tax, legal or financial advice. Gift results may vary. Contact your personal financial advisor for more details specific to your situation.
 1/17/2012

WHAT LEGACY WILL YOU LEAVE?

A bequest is a way to have a **LASTING IMPACT** on the people and organizations that mean the most to you.

THE BENEFITS OF MAKING A CHARITABLE BEQUEST

One benefit of a charitable bequest is that it enables you to further our work long after you are gone. With careful planning, your family can also avoid paying income taxes on the assets they receive from your estate.

A DOLLAR AMOUNT
A PERCENTAGE OF YOUR ESTATE
A SPECIFIC ASSET
THE RESIDUE OF YOUR ESTATE

through estate and income taxes. By designating us as the beneficiary of part or all of your IRA, the full value of your gift is transferred to us tax free at your death and your estate receives a charitable deduction.

Similarly, if your insurance policy is gifted to us at your death, your estate receives a charitable deduction. To make a bequest of your IRA, other retirement account or life insurance policy, obtain a beneficiary designation form from your plan custodian or insurance company and designate us as beneficiary.

903-939-7080
 legacygiving@mercyships.org
 mercyshiplegacy.org

BUSINESS REPLY MAIL

POSTAGE WILL BE PAID BY ADDRESSEE

PERMIT NO. 1000
 ST. LOUIS, MO 63101-1000

POSTAGE WILL BE PAID BY ADDRESSEE

PERMIT NO. 1000
 ST. LOUIS, MO 63101-1000

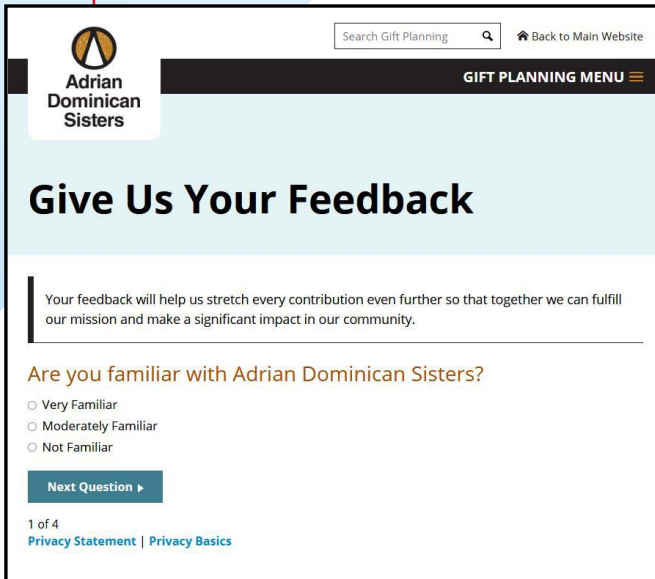
1. Cut off the half of the postcard and complete the form on the back.
 2. Fold and seal with tape before mailing.

For more information on the benefits of making a charitable bequest or for sample bequest language to complete your charitable plan, please visit our website or call us today.

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BOOST ENGAGEMENT

WITH CresSurvey



The screenshot shows the top of a website with a search bar and a 'Back to Main Website' link. Below is the Adrian Dominican Sisters logo and a 'GIFT PLANNING MENU' button. The main heading is 'Give Us Your Feedback'. A paragraph explains that feedback will help stretch contributions. The question is 'Are you familiar with Adrian Dominican Sisters?' with three radio button options: 'Very Familiar', 'Moderately Familiar', and 'Not Familiar'. A 'Next Question' button is at the bottom. Footer text includes '1 of 4', 'Privacy Statement', and 'Privacy Basics'.

With CresSurvey, you can produce a survey customized for your donors and your organization.

Surveys can enhance connections with your donors, help you better understand your donors' motivations and uncover existing legacy commitments or leads.

Adrian Dominican Sisters *Website survey*

Have we made it easy to give to Adrian Dominican Sisters?

- Quite Easy
- Moderately Easy
- Not Easy

◀ Previous Question Next Question ▶

2 of 4

Have we explained to your satisfaction how your donations are used?

- Extremely Well
- Quite Well
- Somewhat Well

◀ Previous Question Next Question ▶

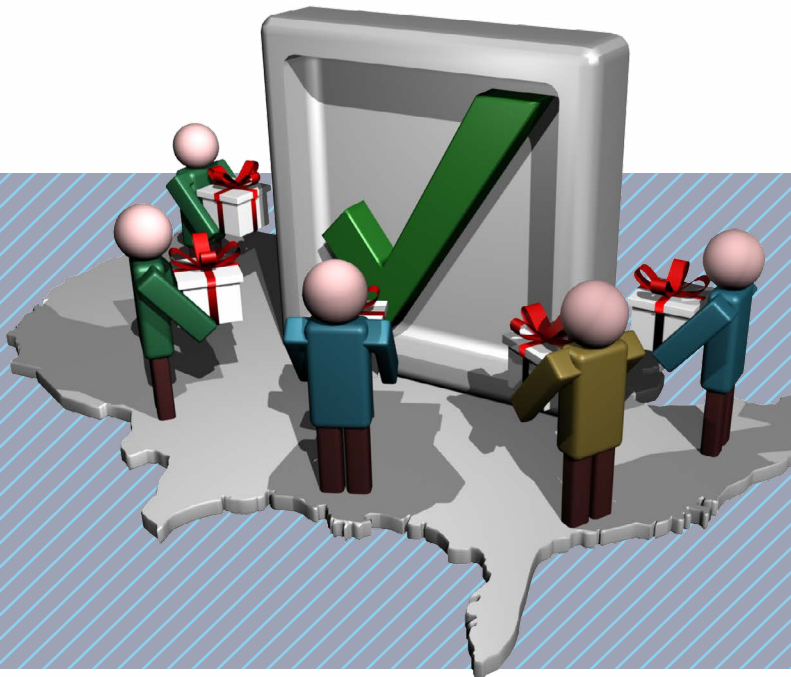
3 of 4

What type of charitable gifts would you be interested in learning more about?

- Gifts Made by Will or Trust
- Gifts of Life Insurance
- Beneficiary Designation Gifts
- Charitable Remainder Trusts
- IRA Charitable Rollover
- Charitable Gift Annuities

◀ Previous Question Submit Survey ▶

4 of 4



CRESPRO DONOR PROPOSALS

THAT INSPIRE GIVING

FAITH-BASED ORGANIZATIONS

The CresPro software includes four-page color donor proposals for all major, blended and planned gifts.

Donor proposals are available to GiftLegacy Pro subscribers with a CresPro license. These motivational proposals are fully customizable, allowing you to insert your logo, branding colors and mission-related images that resonate with your donors. Additionally, you can edit the text and save the proposal as a high-quality PDF to send electronically or to print for your one-on-one donor meetings.



MASTER GIFT CASE



Support The Basilica Landmark
Prepared for «Donor Name»

The Basilica's Impact
The Basilica's ministries address critical needs-homelessness, housing, mental health, and more, offering meals, transportation, job opportunities, and compassion to those in need. The Basilica is blessed to be able to provide a remedy for poverty of resources, as well as poverty of hope. In addition to enhancing the spiritual experience and ensuring its accessibility, and supporting vital social services, restoration of The Basilica will preserve The Basilica's role as a center for intellectual enrichment, a hub for arts and culture.

About The Basilica of Saint Mary
The Basilica of Saint Mary, an architectural and cultural treasure since 1914, is more than a historic landmark-it's a living center of faith, service, and creativity. People of all faiths, ethnicities, and economic backgrounds connect, collaborate and form community at The Basilica. The Basilica serves as a haven for mind, body and soul and challenges parishioners and visitors alike to make a difference in the city. The goal of The Basilica Landmark is to preserve this "Beacon of Hope" and to restore her as a place of resilience, healing, and spiritual renewal.

The Basilica Landmark
88 N 17th St
Minneapolis, MN 55405
612-317-5421
smcuglan@mary.org
thebasilicalandmarklegacy.org

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The Basilica Landmark's Master Gift Case

For GiftLegacy Pro subscribers with a CresPro license, the CresPro charitable gift programs also include a Master Gift Case. This is a one-page explanation of your organization's mission and information on why donors should give to your organization. The gift case is customizable with your images, text, colors and logo.

TOP PROSPECTS IN YOUR

DONOR ANALYTICS

The Top Prospects Report lists your top prospective donors based on website and newsletter activity.

A suggested gift for the donor is also displayed based on their personal activity. If an individual demonstrates frequent activity, it is one of the strongest indications of interest in your organization and its mission.

Score	Name	Last Page Visited	Downloads	Contact
100.0	Donor 1	eNewsletter Preferences	19/05/2010 WillRequest	Contact
100.0	Donor 2	Planned Giving Home	10/11/2010 Unltrust	Contact
100.0	Donor 3	Today's News - Finance News	03/09/2015 Gift Annulity	Contact
92.00	Donor 4	Today's News - Savvy Living	02/26/2011 WillRequest	Contact
89.00	Donor 5	GiftLegacy Donor Manager - Logout	06/09/2015 WillRequest	Contact
89.00	Donor 6	Planned Giving Home	02/06/2015 IRA	Contact
82.00	Donor 7	Planned Giving Home	09/20/2010 WillRequest	Contact
80.00	Donor 8	Privacy Statement	08/27/2010 Gift Annulity	Contact
79.00	Donor 9	GiftLegacy Login Page	01/25/2012 WillRequest	Contact
75.00	Donor 10	Today's News - Savvy Living	08/27/2010 Unltrust	Contact
75.00	Donor 11	Your Plan Download	09/22/2010 WillRequest	Contact
73.00	Donor 12	Privacy Statement	02/28/2015 WillRequest	Contact
70.00	Donor 13	Today's News - Finance News	08/27/2010 Unltrust	Contact
68.00	Donor 14	GiftLegacy Login Page	12/08/2011 WillRequest	Contact
68.00	Donor 15	Planned Giving Home	01/24/2011 Gift Annulity	Contact
62.00	Donor 16	Planned Giving Home	01/28/2011 Gift Annulity	Contact
57.00	Donor 17	Planned Giving Home	02/01/2011 WillRequest	Contact
32.00	Donor 18	Planned Giving Home	01/24/2011 Unltrust	Contact
28.00	Donor 19	Today's News - Finance News	01/24/2011 IRA	Contact
17.00	Donor 20	Today's News - Savvy Living	02/10/2015 WillRequest	Contact
14.00	Donor 21	Today's News - Savvy Living	08/27/2010 WillRequest	Contact
14.00	Donor 22	Personal Planner	08/27/2010 WillRequest	Contact
7.00	Donor 23	Privacy Statement	01/20/2014 WillRequest	Contact

RAISE GIFTS IN JUST A FEW HOURS PER WEEK

As a fundraiser, you want to spend most of your time meeting and talking with donors. If you can find a way to minimize the time spent on marketing and other administrative duties, you will have more time to focus your energies on closing gifts.

Crescendo's GiftLegacy marketing system uses an integrated approach including web, print, email, video, social media and donor surveys. Our goal is to assist fundraisers in educating, engaging and motivating donors to close major and planned gifts.



To help you increase loyal donor engagement and cash gifts in the next quarter, consider enrolling in our CresCoaching class, available at no additional cost to GiftLegacy subscribers.

SUCCESSFUL MARKETING PLANS

Creating a winning marketing plan for your organization will lead to success. Think about the types of campaigns or initiatives you want to highlight.

You might focus on a different marketing concept or gift offering for each quarter. In developing your marketing plan, you need to also consider the timing for each of your marketing touches and how frequently you will reach out to your supporters. Using a donor survey can also help you evaluate how often donors desire to hear from you.

MARKETING PLAN EXAMPLE

Here is an example of a marketing plan for a faith-based organization:

Annual PG Marketing Plan: Bequests, DAFs, CGAs IRA Rollover

Campaign Tools – Faith-Based Organization Example

Annual PG Marketing Plan: Bequests, DAFs, CGAs, IRA Charitable Rollover

Quarterly Mini-campaigns (print mail piece + eBlast + Crescendo eNewsletter + social media post):

- Bequests + Estate Planning Guide Offer – [Month/Year]
- DAFs – [Month/Year]
- CGAs – [Month/Year]
- IRA Charitable Rollover – [Month/Year]
- Crescendo donor eNewsletters – monthly
- Social media posts – monthly
- Annual Impact Report – [Month/Year] – ads on Gift planning and/or donor story spotlight
- Legacy Society Reception – [Month/Year of event date]
- Estate Planning Seminars – quarterly

Timing

- 12-month plan (*tentative*): Fiscal Year: [Month/Year] – [Month/Year]

Segmentation

- PG/Bequest marketing: Age 40+, Legacy Society, Loyal Donors, Major Gift Donors, Current Volunteers, Partners with Organization, Associated churches
- IRA Charitable Rollover marketing: Past IRA Charitable Rollover donors, 70 1/2 or older
- CGA marketing: mid 70's+

Crescendo

Creative Gift Marketing

As you develop your marketing plan, think about the marketing tools, timing and segmentation that would work best for your organization.

SEGMENTING YOUR MESSAGING

is as important as creating a polished marketing piece. The sample marketing plan includes bequest marketing to donors age 40+, loyal donors, board members and legacy society members. IRA charitable rollover and charitable gift annuity marketing is segmented for donors age 70+, which fits the demographics for these gifts.

As a faith-based organization, you have a unique mission and branding that can be reflected in your marketing.

We Can Help

If you would like to learn more about Crescendo's GiftLegacy marketing services and how to use our products, please contact us at 800-858-9154 or visit crescendointeractive.com.

Our team is happy to help you develop a marketing strategy to achieve your goals.



Crescendo

Major & Planned Gifts Marketing



crescendointeractive.com