



SHARPE

# INSIGHTS

A look at how we are helping nonprofits raise large gifts

2025, Issue 8

## Test Your YEAR-END MARKETING KNOWLEDGE

1. For charities, the most generous time of the year is:

- A. The start of the new year.
- B. Just after the tax season.
- C. The final quarter of the calendar year.
- D. None of the above.

2. Fall is the time to begin fine-tuning your marketing plans by:

- A. Creating a marketing calendar that includes schedules for direct mail, events and digital strategies.
- B. Targeting donors who can make QCDs or gifts of appreciated securities.
- C. Promoting gifts from donor advised funds, family foundations and closely held businesses among your more affluent donors.
- D. All of the above.

3. Nearly as important as the content is knowing the best ways to use your printed year-end materials. They are:

- A. As inclusions with your year-end appeal letter.
- B. As handouts at seminars or special events.
- C. As “leave behind” pieces following personal visits with donors.
- D. All of the above.

4. Several national events have been established to help nonprofits encourage year-end gifts, such as:

- A. **U.S. National Philanthropy Day:** Celebrated on Nov. 15, this is a day set aside to bring attention to volunteers and donors.
- B. **#GivingTuesday:** The Tuesday immediately following Black Friday and Cyber Monday, a day that inspires people to give, collaborate and celebrate generosity.
- C. **Year-End Day:** Recognized on Dec. 31, this day marks the charitable giving deadline for millions of taxpayers.
- D. All of the above.

How did you do?

The answers are: 1.) C 2.) D 3.) D 4.) D.



Download our free 2025 Year-End Survival Guide now.



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INSIDE:



The Perfect Combo Meal



End the Year on a High Note

SHARPE GROUP<sup>®</sup>

Helping Nonprofits Raise Large Gifts



## The Year-End/Planned Giving **COMBO MEAL**

Your development efforts don't have to become a battle between encouraging year-end gifts today and promoting planned gifts. With a little ingenuity, the two concepts can be successfully communicated at the same time.

**Use planned giving inserts in year-end gift receipts and donor acknowledgments.** As this communication is part of a "thank you" rather than an "ask," it offers an excellent opportunity to suggest ways to make gifts that feature additional benefits for your donor and your charity.

**Include planned giving ads and articles in other organizational publications the last quarter of the year.** This is a cost-effective way to educate constituents on various gift planning opportunities.

**Distribute planned giving materials at board meetings and special events in the fall.** You have a captive and generally highly motivated audience that is interested in your organization.

**Add planned gift tag lines to your email and on other digital marketing.** Including a phrase such as "Consider including \_\_\_\_\_ in your will or trust" reminds donors that planned gifts are welcomed and appreciated any time of year.

**In year-end appeals, include check-off requests for gift planning information on response devices.** This can convey your planned giving message in a format that should not compete with solicitation of current gifts. The same principal applies after a donor has given online as the final step in the process of online gift completion. ■

**FACT: The 65 and older population still values direct mail communications. With more than 11,000 baby boomers turning 65 every day, they are currently the most generous generation and will be for the foreseeable future.**

With Sharpe's **Comprehensive Data Services**, you can turn your donor database into a gold mine by adding crucial demographic information such as age, wealth, gender and marital status, allowing you to plan successful targeted appeals.



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learn more.

# End the Year **ON A HIGH NOTE**

Even though many organizations and institutions follow a fiscal year for budgeting purposes, your donors are looking at the calendar when they are considering their charitable giving. Here are some “best practices” from successful year-end fundraisers.

**1. You’ve got to know your donors.** Consider targeting certain groups based on age, wealth and gift history who can make gifts such as:

- QCDs or gifts from DAFs.
- Stocks, cryptocurrency or other valuable property.
- Life income arrangements.

**2. Encourage gifts of securities.** Remind donors looking for the best ways to give that gifts of appreciated securities and other assets can yield special tax benefits whether or not donors itemize their tax deductions. Inform those who have appreciated securities that it may be best to make gifts using those assets and use their cash to diversify their investments or rebalance their portfolios.

**3. Encourage repeat gifts and additional contributions.**

Keep in contact with those who have already completed gift annuities, trusts and other irrevocable deferred gifts. They can be among your best candidates for new gifts. Also keep in mind that some donors may no longer need the income that attracted them to a particular gift plan in the past and could in some cases redirect a portion of income being produced or partially or fully terminate the gift plan before the end of their lifetime.

**4. Treat yourself.** Plan now for any training or development you or your staff may need in the coming year. Conversational knowledge about gift plans is an integral component to a successful planned giving program. The Sharpe Charitable Giving SUMMIT is a top-rated training opportunity for gift planners who take an integrated, donor-centered approach to fund development. There are options to attend in January, both in person in Orlando and virtually. ■

Picture Yourself Here



**January 12-15, 2026**  
In-person and virtual



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## A Few More **IMPORTANT THINGS TO REMEMBER**

**Are you prepared to handle the influx of year-end gifts?**  
**Remember to:**

- ☒ Confirm you have adequate staff coverage in your charity's headquarters or development office through the end of the business day on Dec. 31.
- ☒ Establish clear and easy-to-follow internal procedures for last-minute gifts.

- ☒ Have acknowledgment letters and tax receipts ready to be sent.
- ☒ For appreciated securities gifts, QCDs and gifts from DAFs, ensure proper documentation processes are in place.
- ☒ Have backup plans for any online technical issues that may occur.

## 2025 On-Demand Library

### Personalized Brochures:

#### 2025 Year-End Giving Quiz\*

A short-format brochure that offers a brief overview of different giving methods and timing considerations presented in an engaging quiz format.

#### Giving at Year-End 2025\*

A short-format brochure that includes charitable giving ideas for both current and future gifts to help your donors meet personal and philanthropic goals.

### Personalized Booklets:

#### 2025 Year-End Giving Guide\*

A long-format booklet that explains numerous giving options and illustrates the advantages of each gift method so donors can determine the most beneficial way to complete their charitable gifts this year.

#### The Benefits of Giving Securities at Year-End\*

A long-format booklet that details the advantages of making gifts of appreciated property, including examples of tax savings and other strategies for reducing capital gains.

*\*Includes Sharpe Group's 2025 Stock Gift Calculator.*

### Personalized Pocket Guides:

#### Your Guide to Federal Taxes 2025

A year-end version of the popular Federal Tax Pocket Guide featuring income and estate tax figures for use by your advisor network of attorneys, trust officers, financial planners and accountants.

#### Tax and Estate Planning Guide 2025

One of the most popular pocket guides, packed with important financial information and planning tips for donors as they consider their year-end gifts.

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summer pricing!**



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