

The Great Wealth Transfer

How nonprofits can build a **multi-generational** donor base that *lasts*



+



Why We Care

\$84 Trillion
wealth transfer



Why We Care

\$12-15 Trillion
to nonprofits



Why We Care

Boomers currently account for 43% of all charitable donations in the US.

Group Poll

1

What percentage of your donor base are Boomers?

2

What percentage of your donation revenue comes from Boomers?

Reality Check

*Over-reliance on older & major donors
is not a future problem.*

It's a “you're already late” problem.

Reality Check

Other Nonprofits + Younger Gens



Reality Check



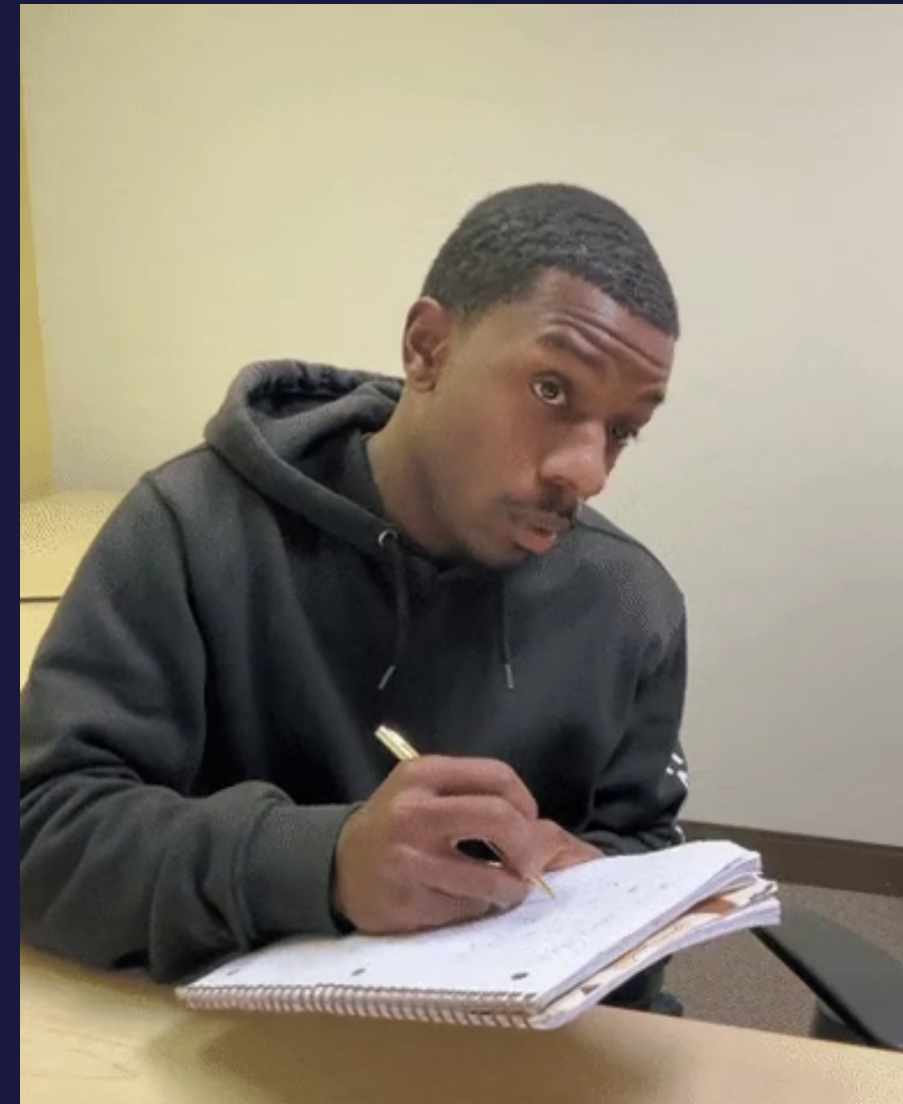
“The best time to plant an oak tree was 30 years ago.
The next best time is today.”

Coming Up...

Generational Profiles

Programs to reach them

How tech helps (or hurts)



Boomers → 1946-1964

62-80 yrs old

Priority:

Legacy

Love Language:

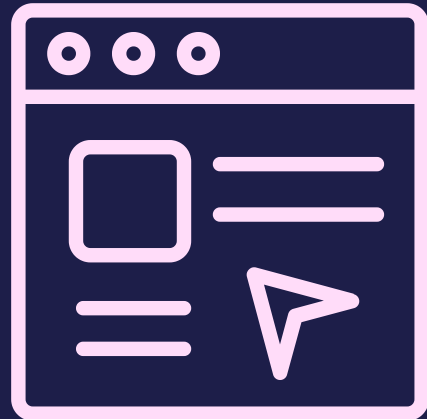
**Trust
Personal Touch**

Overlooked Opportunity:

Network of younger gens

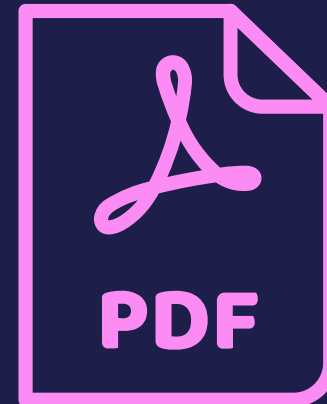


Boomers: Programs to Run



Dedicated Landing Page

Bequest
Beneficiary
DAF



One Page Explainer

For advisors



Simple Intake Form

Request a call
Notify us

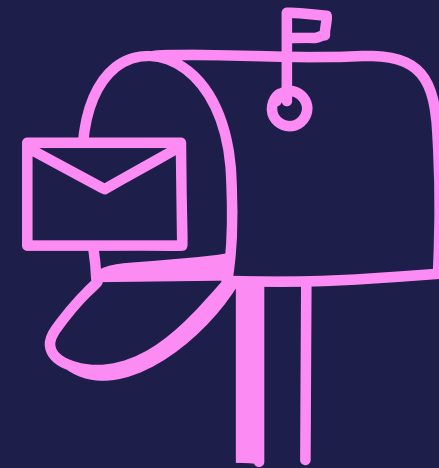
Planned Giving & Bequests

Boomers: Programs to Run



Names Listed by Preference

Public
Private
Anonymous



Annual Legacy Update

Direct Mail



Recognition Moment

Call
Hand-written note
Invitation

Boomers: Programs to Run



**“Thank You”
call within
2 days**



**Quarterly Impact
Note**

One story, metric,
or photo



**Stewardship
snapshot**

Funds in → funds out

Personal Touchpoints

Boomers: Programs to Run



“Give Together”

Holidays
Birthdays



Family Challenge

Tied to a specific
outcome



Story Prompt

“Why Our Family
Gives”

Family Giving Programs

Where technology can help...

Boomers: CRM Segmentation & Automation

01 Track Household connections

02 Label contacts with household info
Ex: Head of household, partner, dependent

03 Tag contacts for affinities
Ex: Legacy interest, family influencer, next gen

04 Automate outreach when family member opts in
Email and/or text message to Boomer & new member

Where technology can hurt...

Don't forget the

Human Touch

Automation Pitfalls:

Mass messaging

Robotic language

Digital only outreach



Gen X → 1965-1980

46-61 yrs old

Priority:

Impact

Qualities:

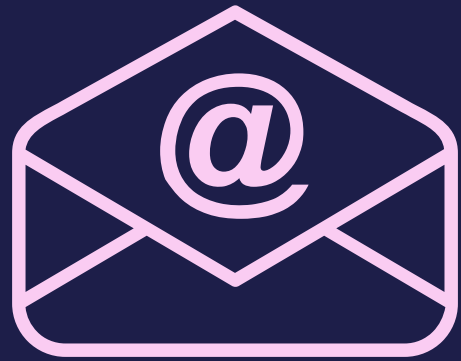
**Pragmatic
Selective**

Opportunity:

Major donor pipeline



Gen X: Programs to Run



Quarterly Results Email

Donor contribution
What changed
What's next



Impact Snapshot

For major gift & DAF
conversations

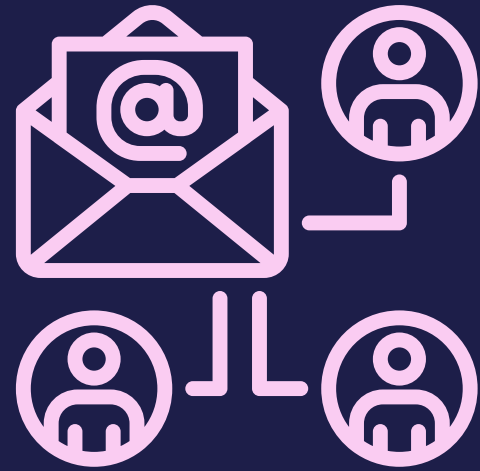


“Where Your Gift Goes” Page

Image-forward

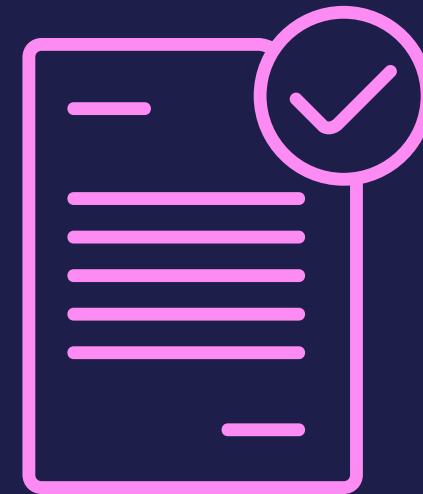
Impact Reporting

Gen X: Programs to Run



Email Series

Stock Gifts
DAF grants
IRA QDCs



“Give Smarter” One Pager

For advisors

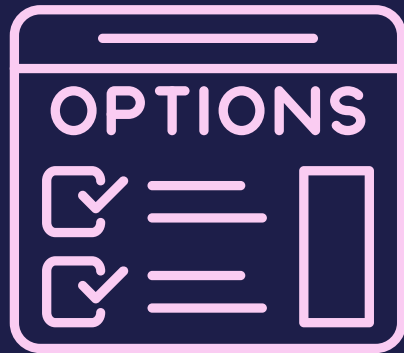


“Talk to Us” Form

Human support
Clear next steps

Tax-Smart Giving Education

Gen X: Programs to Run



Dual CTAs

“Make a gift now”
+
“Include us in your plans”



Legacy Nurture

Per quarter:
2 impact updates
+
1 tax-smart reminder



Legacy Starter

Learn before
committing

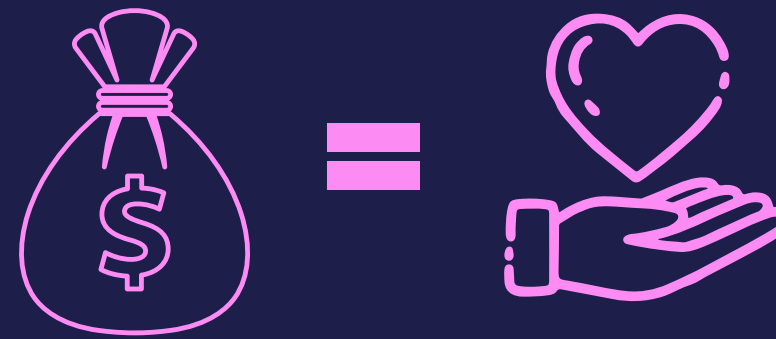
Blended Gift Pathway

Gen X: Programs to Run



Collective Win

Time Bound
Scoreboard



Impact Framing

Dollar amounts
linked to outputs



Helpers High

Post-gift payoff

Outcome Based Appeals

Where technology can help...

Gen X: Behavioral Automation

Run an email series that changes next steps based on behaviors

Ex: Opens & clicks



One landing page = multiple uses

Ex: Hosts explanations, downloadables & can be customized for time-bound campaigns



Fund stewardship language

Ex: How restricted gifts are tracked and supported

Where technology can hurt...

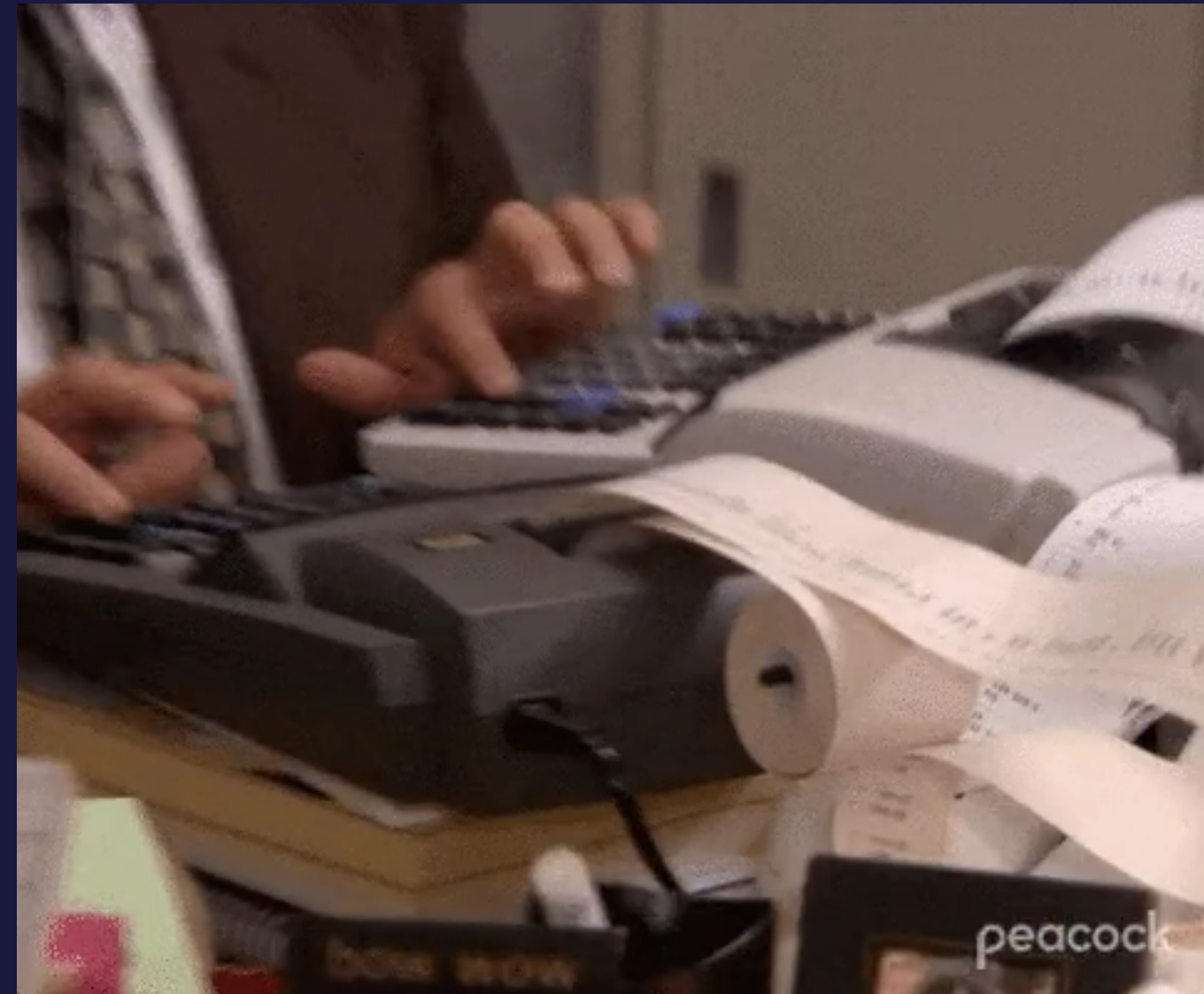
Don't forget the

Account-ability

Fund accounting pitfalls:

For-profit tools

Handoff gaps



Millennials → 1981-1996

30-45 yrs old

Priority:

Community

Qualities:

**Mission-led
Peer-influenced**

Opportunity:

Awareness & Reach



Millennials: Programs to Run



Quarterly Campaigns

Theme
Goal
Assets
Prompts



Personal Pages

“Why I’m in...” over
organizational copy

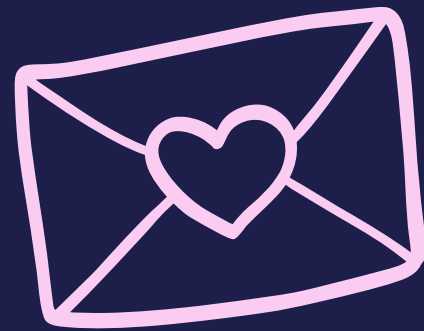


Micro-updates

One stat
One story
One next step

P2P Ambassador Program

Millennials: Programs to Run



Post-Volunteer Outreach

Thanks
Impact
Next Opportunity



“Bring a Friend”

Invitation in every
volunteer message

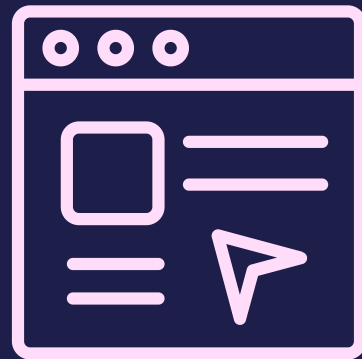


Recurring Impact

Soft ask with context

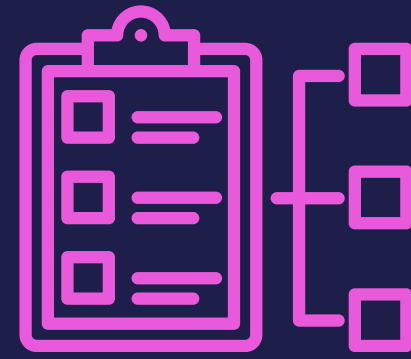
Volunteer-to-Recurring Pathway

Millennials: Programs to Run



“Where Your Gift Goes” Page

Simple & honest



Decisions Breakdown

Principals
Priorities
Measurements



Impact Recap

Skimmable
Easy to share

Radical Transparency Kit

Where technology can help...

P2P Enablement & Tracking

They get:

Ease of Use

Design templates

Social Media Support

QR codes

You get:

Visibility

Reporting

Segmenting

Automated outreach

Where technology can hurt...

Don't forget to

Show Love

Recurring Giving Pitfalls:

Complacency

Non-segmentation

Lack of Community



Gen Z → 1997-2012

14-29 yrs old

Priority:

Values

Qualities:

Sense of urgency
Skeptical

Opportunity:

Long-term loyalty



Gen Z: Programs to Run



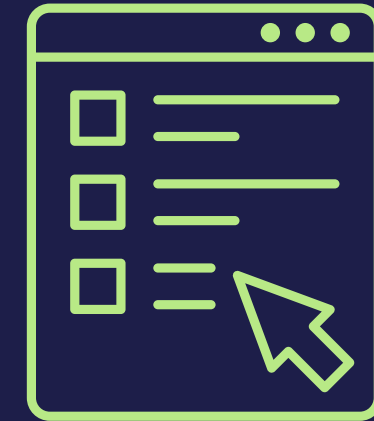
“Match This Moment”

Live progress tracker



Mobile-First Assets

Short video
One stat
Impact moment

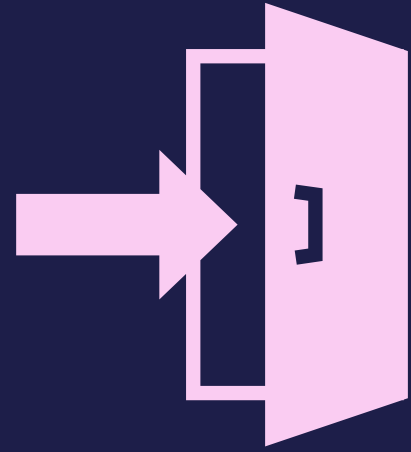


Impulse-Designed Form

Minimal fields

Rapid Response Campaigns

Gen Z: Programs to Run



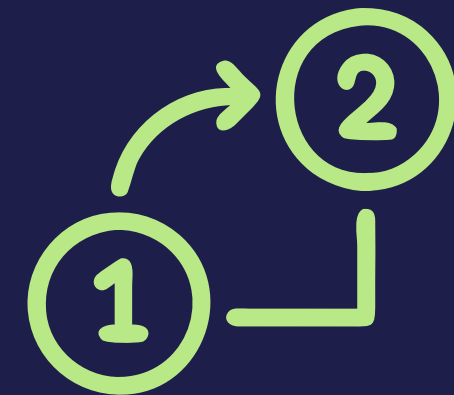
Entry Asks

Accessible
Specific



Impact Protection

Round up your gift
Cover fees



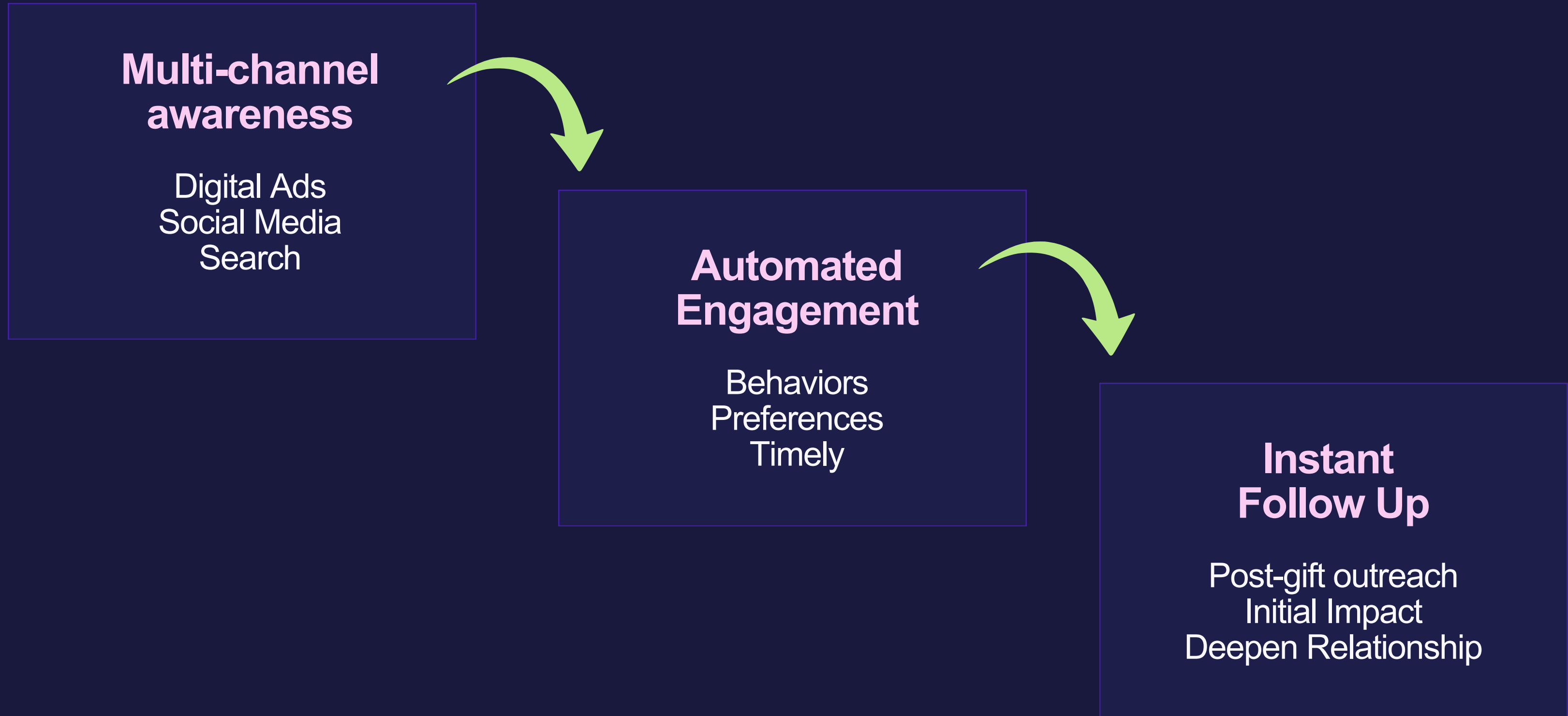
2-Step Upgrade Path

Proof of impact
Recurring invitation

Micro-Giving + Recurring

Where technology can help...

Creating Urgency



Where technology can hurt...

Don't forget to

Make It Easy

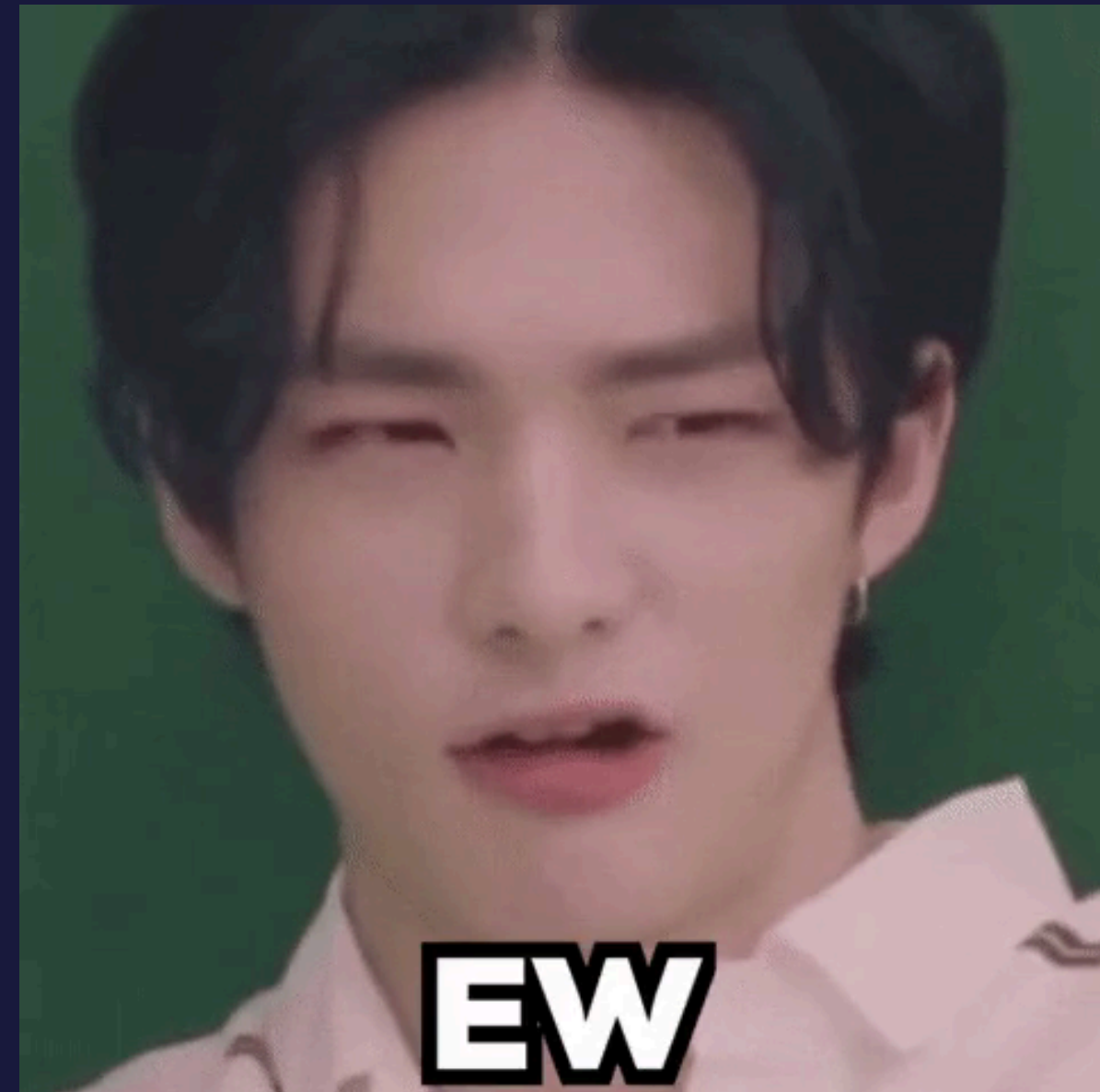
User Interface (UI) pitfalls:

Slow loading

Too many fields

Not mobile optimized

Ugly 🤢



Gen Alpha → 2013 on

13 and younger

Pathway:

Family

Outreach:

**Participation
Interactive**

Opportunity:

Deep connection

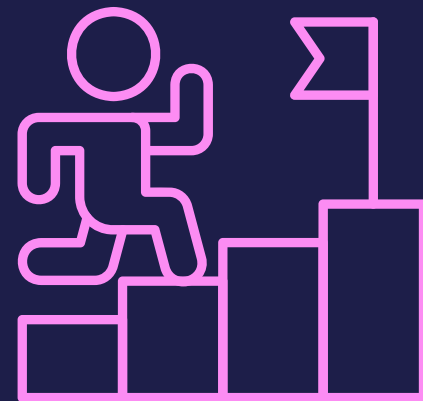


Gen.Alpha: Programs to Run



Family Volunteer Days

Age appropriate roles
Impact recap



Mission Challenge

Daily actions
Badge or certificate



Classroom Activation

Learn, do, share
Facilitator kit

Family & Gamification

Good News...

You don't need 5 separate programs 😄

Programs that stretch across generations

Program or Tactic	Boomers	Gen X	Millennial	Gen Z	Gen Alpha
Blended gift / legacy pathway	✓	✓			
Outcome-based appeals with scoreboards	✓	✓	✓	✓	
Peer-to-peer fundraising		✓	✓	✓	
Impact reporting / transparency assets	✓	✓	✓		
Recurring giving program		✓	✓	✓	
Family giving and participation programs	✓				✓
Volunteer pathways			✓	✓	✓
Mobile-first donation experience		✓	✓	✓	

Questions?