ClearView CRM
fundraising software from SofTrek Corporation

Planned Giving

When you secure a planned gift, you secure a commitment for your organization's mission—and its future.
ClearView's planned giving tools help you manage all stages of your planned giving program, from initial donor contact to gift receipts. You'll be able to handle bequests, pooled income funds, trusts and charitable gift annuities.

Organize, track, and manage all stages of planned gifts.

- Gain a comprehensive view of existing and pending agreements
- Record and organize detailed beneficiary information
- Record contact information for attorneys and other related parties
- Ensure each planned step is completed on schedule by setting reminders for donor contacts
- Schedule acknowledgements for gifts

Identify candidates for planned gift solicitation.

- Get wealth screening information from integrated WealthEngine tools
- Run donor profile reports for detailed information on planned gift histories for individual donors

Get a full, accurate picture of donors, gifts and more.

- Track multiple contacts, beneficiaries, relationships, and gifts from one centralized location
- View the complete financial record of each planned gift
- Track market value histories to show the growth of your planned gifts

Related ClearView CRM Tools

- Contact Management
- Direct Mail Marketing
- Reporting and Analytics

For more information, contact SofTrek at 800.442.9211 or sbirnbaum@softrek.com.