COMPASS™ by Aspira Philanthropy

DATA
INSIGHTS
RELATIONSHIPS
GREATER IMPACT

Planned Giving Prospect Intelligence

Who should you talk to about planned giving?

Identify and prioritize the donors who warrant a thoughtful planned-giving conversation.



Behavioral intelligence.
Not wealth screening.

DEEPER RELATIONSHIPS

SMARTER CONVERSATIONS

A STRONGER TOMORROW

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Know where to begin.

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Planned giving starts with the right people.

Most nonprofits know planned giving matters. The challenge is more practical: they do not know which donors warrant attention first. Aspira helps answer that question.



A donor who has given **$75 every year for 18 years** may be a stronger planned-giving prospect than someone who made a single **$10,000 gift.**

What we look for

- Relationship longevity
- Consistency across available years
- Recency of support
- Frequency and habitual giving
- Annual, seasonal, or recurring patterns
- Giving acceleration and sustained upgrades
- Exceptional gifts relative to a donor's own history

Not this

- Not a generic database filter
- Not a wealth-screening list
- Not simply your largest donors

*"**A prioritized list of people** — not another abstract discussion about the importance of planned giving."*



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Explainable prospect intelligence

Every prospect is supported by observable evidence. This is not a black-box score and not an unexplained list of names.

Illustrative donor profile

Longtime Supporter

Environmental Conservation

Passionate about healthy oceans and resilient coastal communities.

"A 17-year journey from a first gift to extraordinary support for a healthier ocean."



Why we notice this donor

- 17-year relationship
- 15 active giving years
- Currently engaged
- Habitual support
- Giving acceleration
- Exceptional gift relative to personal history

Priority tiers

Tier A — Priority prospects

The strongest combination of long-term loyalty, habitual support, current engagement, and other meaningful behavioral indicators.

Tier B — Strong prospects

Substantial evidence of affinity and commitment; appropriate for selective outreach, planned-giving education, and focused cultivation.

Tier C — Emerging prospects

Meaningful evidence of affinity, but better suited to longer-term communications and future monitoring.

Each priority placement is supported by relevant behavioral evidence.

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What you receive

A practical, decision-ready engagement built to help leadership know where to begin.



1. **Prioritized prospect workbook**
   An Excel workbook organizing individual donors into actionable priority groups.

2. **Explainable prospect information**
   Each prospect is supported by clear behavioral evidence, not just a score.

3. **Existing legacy donor stewardship list**
   Known planned-gift donors are separated into a stewardship population.

4. **Data review list**
   Records needing cleanup, clarification, or internal review before outreach.

5. **Leadership briefing**
   Focused review of the findings, the top priorities, and how to begin outreach.

At a glance

Fixed project fee:
$7,500

Anticipated delivery:
approximately four weeks after receipt of complete, usable data

Data protection

Identifiable donor data is processed within Aspira's controlled analytical environment and is not entered into public generative AI systems.

What this engagement is not

- Not legal, tax, or estate-planning advice
- Not direct donor solicitation
- Not a guarantee of planned-giving commitments or revenue

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Ready to identify the right planned-giving prospects?