



Ligia Peña

GlobetrottingFundraiser (CA)



CEE FUNDRAISING
CONFERENCE

INTEGRATING A ROBUST LEGACY PIPELINE FROM START TO FINISH

Masterclass

Speaker: **Ligia Peña** GlobetrottingFundraiser (CA)
Date: **Wednesday, 11 October 2023** – 13:00-18:30
Venue: AC Hotel by Marriott, Vysoká 2A, Bratislava, Slovakia

12:00-13:00 >> **Delegate Registration for the Masterclass Program**
13:00-14:30 >> **Part 1**
14:30-15:00 >> **Coffee Break**
15:00-16:30 >> **Part 2**
16:30-17:00 >> **Coffee Break**
17:00-18:30 >> **Part 3**

Legacies (gifts in wills) represent a significant philanthropic opportunity for charities, but many are missing out on potential funds by failing to properly engage with donors. The key lies in knowing how to integrate the right messaging across all communication channels and creating engaging journeys at every stage of the legacy pipeline.

During this masterclass, we will delve into the mechanics of establishing a robust legacy pipeline in your fundraising program. Whether you are a small organization or a large charity, this interactive, research and data-driven masterclass will prepare you to start implementing or revitalizing your gifts in wills program immediately.



Learning objectives:

- How to use data to identify prospects and develop solid strategies and tactics.
- How to engage and steward prospects at every stage of a legacy pipeline to secure a pledge.
- How to design inspiring marketing materials that leverage behavioural science principles.

Who should attend:

- Anyone seeking to secure their organisation's financial sustainability.
- Organisations keen to elevate their bequest game.
- Fundraising professionals eager to diversify their funding sources.

Suggested level of audience:

- Intermediate – the charity must have an individual giving programme with individual donors who give at different levels.

Ligia Peña, CFRE, is an International Legacy Consultant and Strategist at GlobetrottingFundraiser, a firm dedicated to helping charities worldwide develop their legacy fundraising strategies. With extensive experience, Ligia has contributed to the development of legacy strategies in 15 different markets across the globe for various non-profit organizations and NGOs. A hardcore legacy nerd, Ligia is currently pursuing a Ph.D. at the University of Kent in the United Kingdom, where her research focuses on national legacy marketing campaigns as tools to change society's behaviour towards including gifts in wills.

Ligia is a highly sought-after and seasoned international presenter who has trained thousands of fundraisers in the science and art of legacy fundraising. Being a numbers geek, her approach is focused on helping nonprofits develop strategic, data-driven gifts in wills programs.

She is also the author of the 'Small Shop Fundraising' chapter in the second volume of *Excellence in Fundraising in Canada*, various articles in AFP's newsletter *Advancing Philanthropy*, as well as a guest on many industry podcasts.

Born in Buenos Aires, Argentina, Ligia calls Montréal, Canada her home, or any place with access to wifi. She is fluent in Spanish, French, and English (and manages in Portuguese and Italian). Having recently moved to the countryside, you can find her beautifying her new lakehouse or playing with her puppy Leo.



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**Please evaluate
this masterclass at**

bit.ly/2023ligia

Thank you!



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