# LEGACY LIFT: Establish, Grow or Re-ignite Gift Planning





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OPPORTUNITIES

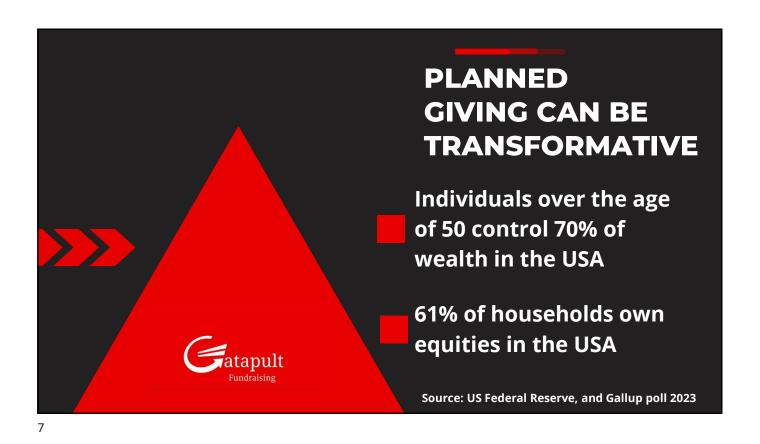
11 33% of Americans are willing to consider a charitable bequest

12 Average age of first bequest designation is 45-50

13 The younger you reach a prospect, the better: You'll increase annual giving by 6x-7x

14 Once a nonprofit is in the will, it is likely to remain by 75%

Sources: FreeWill 2022 Planned Giving Report, Giving USA, Donor-Centered Planned Gift Marketing



What have been your experiences and challenges in identifying planned giving prospects?

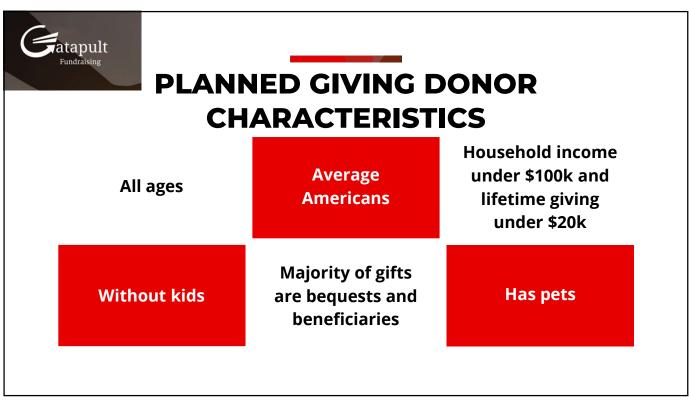
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What have been your experiences and challenges in identifying planned giving prospects?

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RECENT BEHAVIORS OF PLANNED GIVING DONORS

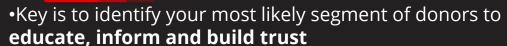
Competition: 1.54+ Million US Charities

Approximately 30% of people will tell you they have left a gift for your organization

Use to be an average of 4 charities in a Will and it is moving towards 1 charity

Donors are supporting on average of 9 charities with annual gifts. Will consider up to 7 charities when selecting 1 for a planned gift.





- •Prioritize donors who are giving to your organization and other charities to **educate**, **inform and build trust**
- •Engage non-donor prospect pipelines in planned giving messaging to **educate**, **inform and build trust**

Source: Mal Warwick Donordigital 2024

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# WAIT. WAIT. DON'T AUTOMATE











TELEPHONE OUTRED GIVING

1 Reach and engage many prospects within months

2 Identify interest

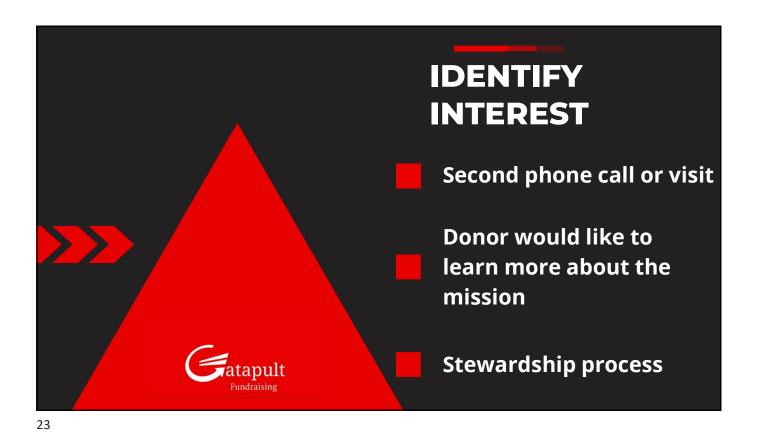
3 Build Relationships

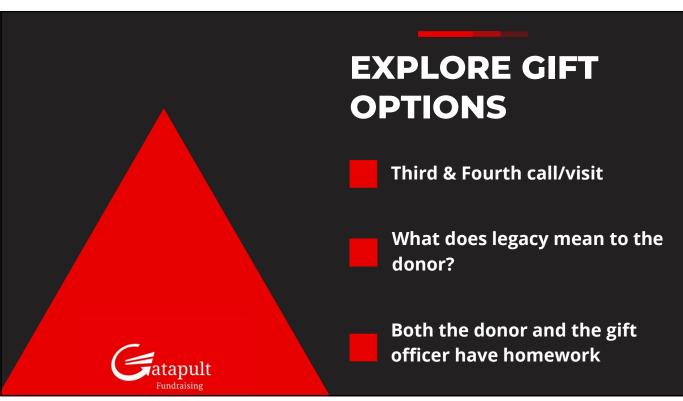
4 Document Gift Expectancies

5 Donor Stewardship

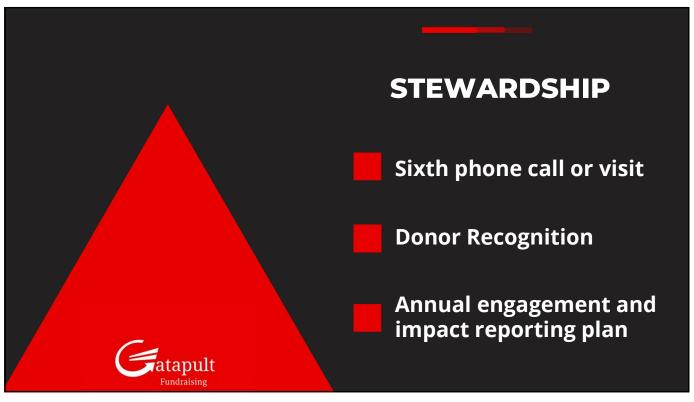




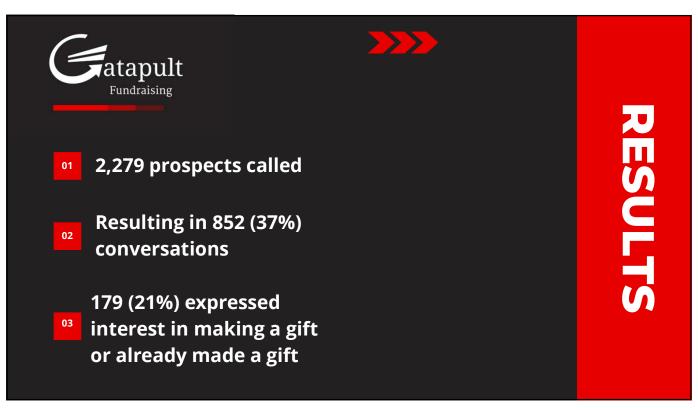


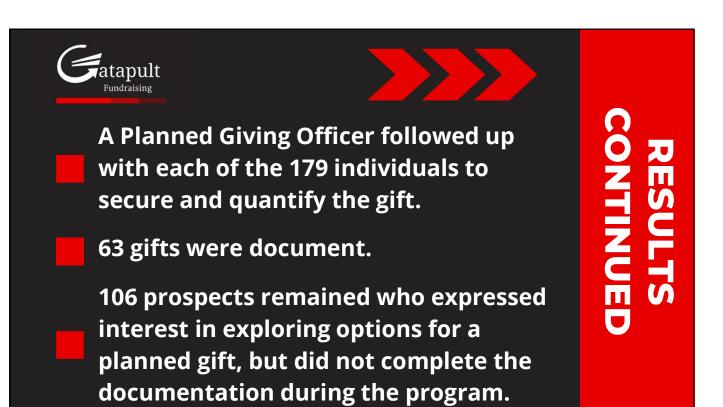












# THE BOTTOM LINE Secured 63 planned gifts Total closed gifts \$4.62M



# THOUSANDS OF LOYAL DONORS ARE WAITING TO BE ASKED



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### **Call 1: Thank Loyal Donors**

### Introduction:

- "Good [Morning/Afternoon], may I speak with [Title Full Name]?"
- "My name is [Your Full Name], and I am calling on behalf of [Organization]. I wanted to personally thank you for your generous support over the years. Our records show you have been a loyal supporter since [Year]! It is such an honor to tell you how much we appreciate your unwavering support. Your contributions help ensure that [Organization] can continue its mission of [Organization's Mission]."

### **Bonding Questions:**

- "If you don't mind my asking, what inspires you to support [Organization] year after year?"
- "How did you become involved with [Organization]?"
- "Do you know anyone who has used [Organization] services?"
- "What types of information and communication would you like to receive from [Organization]?"
- "Which [Organization] programs are most important to you, and why?"

### Goodbye:

"Thank you again for your continued support, [Title Full Name].
 It has been a pleasure speaking with you. Have a wonderful day!"



### **Call 2: Identify Interest in Planned Giving**

### Introduction:

 "Good [Morning/Afternoon], [Title Full Name]. This is [Your Full Name] from [Organization]. I wanted to follow up on a letter we sent recently. But first and foremost, I want to thank you once again for your incredible support over the years."

### **Discussion:**

- "Did you receive the letter from [Name of Donor Who Signed the Pre-Call Letter]?"
  - If Yes: "Great! As mentioned, [Donor Name] shared their involvement with [Organization] and the importance of our mission. Many of our loyal donors, like [Donor Name], are supporting [Organization] with both annual gifts and planned gifts, such as through their will or retirement accounts."
  - If No: "No problem. The letter was to inform you about the impact of your support and to let you know that I would be calling. Many of our loyal donors are supporting [Organization] with both annual gifts and planned gifts, such as through their will or retirement accounts."

### Ask:

- "In light of what you've shared about your support for our mission, would you be interested in exploring ways to include [Organization] in your long-term plans?"
  - If Yes: "Wonderful! Thank you so much, [Title Full Name]. It would be great to introduce you to [Name of gift planning specialist] who can explain the various options. When is the best time to reach you?"
  - If No: "I understand. If you have any questions or need more information in the future, please feel free to reach out. Thank you for your time and support."

### Goodbye:

• "Thank you again for your time, [Title Full Name]. Have a great day!"





# Call 3: Explore Planned Giving Gift Options Introduction:

 "Good [Morning/Afternoon], [Title Full Name]. This is [Your Full Name] from [Organization]. I appreciate you taking the time to speak with me again. Following our last conversation, I wanted to explore the various planned giving options with you."

### **Discussion:**

 "There are several ways you can make a lasting impact through planned giving, such as bequests in your will, gifts of stock, or naming [Organization] as a beneficiary of your retirement account or life insurance policy. What types of planned giving options are you most interested in learning about?"

### **Questions to Explore Options:**

- "How do you decide what it means to be generous? How do you discuss generosity with your family?"
- "What impact do you hope your gift will have on the future of our mission?"
- "Would you be interested in learning more about the tax benefits of planned giving?"

### **Next Steps:**

"Based on our discussion, I will have [Name of our planning specialist]
prepare some information for you. When would be a convenient time
for them to reach out to you to discuss these options in more detail?"

### **Goodbye:**

"Thank you so much for considering these options, [Title Full Name].
 We are deeply grateful for your support. Have a wonderful day!"





## Call 4: Follow-up call to discuss [Name of our planned giving specialist] giving options

### Introduction:

 "Good [Morning/Afternoon], [Title Full Name]. This is [Your Full Name] from [Organization]. I hope you're doing well. I'm following up on our last conversation about planned giving options for [Organization]."

### **Discussion:**

 "I wanted to check in and see if you had any further questions or thoughts about the planned giving options we discussed. Is there any additional information you need or anything you'd like to clarify?"

### **Questions to Facilitate Further Discussion:**

- "Have you had a chance to consider which planned giving option might be the best fit for you?"
- "Would you like to schedule a meeting with our gift planning specialist to go over any specific details or benefits?"
- "Is there any aspect of the planned giving process that you feel uncertain about or need more information on?"

### **Next Steps:**

- "To help us move forward, we can arrange for our gift planning specialist to provide detailed information on the options you are most interested in. When would be a convenient time for you to have this discussion?"
- "Would it be helpful to review any tax benefits or other financial advantages of planned giving with our specialist?"

### Goodbye:

 "Thank you for considering these options and for your continued support, [Title Full Name]. We deeply appreciate your commitment to [Organization]. I'll be in touch soon to confirm the next steps. Have a wonderful day!"



### **Call 5: Confirm and Quantify Planned Gifts**

### Introduction:

• "Good [Morning/Afternoon], [Title Full Name]. This is [Your Full Name] from [Organization]. I hope you're doing well. I wanted to thank you again for your interest in supporting [Organization] through a planned gift."

### **Discussion:**

 "I wanted to confirm the details of your planned gift and ensure we have everything in order. Could you please provide some specifics about your planned gift, such as the type of gift and the intended amount?"

### **Questions to Confirm and Quantify:**

- "Have you included [Organization] in your will, or are you considering other forms of planned gifts?"
- "Would you like assistance from our gift planning specialist to finalize any details?"
- "Are there any specific programs or areas within [Organization] that you would like your gift to support?"

### **Next Steps:**

 "Once we have the details confirmed, we can acknowledge your generosity appropriately. Would you be comfortable with us recognizing your planned gift in our publications or would you prefer to remain anonymous?"

### **Feedback and Recognition:**

- "We are always looking to improve how we engage with our planned giving donors. Is there anything we can do to better recognize your generosity or make you feel more connected to our mission?"
- "Would you be interested in sharing your story or reasons for supporting [Organization] in our donor communications? Many of our donors find it inspiring to hear from others who share their passion for our mission."

### Goodbye:

 "Thank you so much for your generosity and support, [Title Full Name]. Your commitment ensures that [Organization] can continue its mission for years to come. Have a great day!"



### **Call 6: Planned Giving Donor Stewardship**

### Introduction:

- "Good [Morning/Afternoon], [Title Full Name]. This is [Your Full Name] from [Organization]. How are you today?"
- "I hope everything is going well with you. I wanted to take a moment to express our heartfelt gratitude for your planned gift to [Organization]. Your generosity means the world to us and makes a significant impact on our mission to [Organization's Mission]."

### **Stewardship Discussion:**

- "As a valued member of our [Legacy Society/Planned Giving Donor Circle], I
  wanted to update you on some of the exciting developments and projects your gift
  is helping to support."
  - Share a recent success story or update on a program that aligns with the donor's interests.
  - Highlight any upcoming events, publications, or recognition opportunities that involve planned giving donors.

### **Engagement Questions:**

- "Do you have any questions about how your gift is being utilized?"
- "Are there any specific programs or initiatives within [Organization] that you would like more information about or that you are particularly interested in?"
- "How would you like to stay informed about the impact of your gift? We can provide regular updates through newsletters, personal visits, or special events."

### **Next Steps:**

- "We will continue to keep you updated on the impact of your gift and the progress of our programs. Please don't hesitate to reach out if you have any questions or if there is anything we can assist you with."
- "Is there a good time for us to touch base again in the coming months to keep you informed and engaged with our work?"

### Goodbye:

 "Thank you once again, [Title Full Name], for your incredible support and commitment to [Organization]. Your generosity is making a profound difference. Have a wonderful day, and we look forward to staying in touch!"

