

## **Presentations to Professionals**

If you want to cultivate estate planning professionals, do so in small groups, focus on the mission and services of your organization, and give them breakfast or lunch. Some large universities offer continuing education credits and a star speaker. This is not a realistic strategy for most nonprofits. You can, however, provide an informative and intimate look at your organization's mission and services and let your guests know that if they need technical information about charitable giving, they should call you.

Most busy professionals will come to a meeting like this only if personally invited by someone they know and respect. That's the job of your planned giving committee. Simply sending out an invitation to a list of local estate planning professionals will yield disappointing results. Your committee members must personally call your prospects, tell them about the event, and get them to put it on their calendar. Only then should you send the invitation, which at that point is more a confirmation letter. Here are some tools you can adapt to your circumstances:

### **Timeline for Staging an Estate Planning Professionals Cultivation Event (Allow three months)**

Choose date, time and place for the presentation

Determine number of guests you hope will attend.

Develop the program, e.g.:

12:00 - 12:15: Guests greeted, name tags affixed, lunch served

12:15 – 12:20: Welcome and introductions

12:20 – 1:00: An inside look at the work of our organization

1:00 – 1:10: How our planned giving program can help you

1:10 – 1:30: Optional tour

Select speakers

Prepare prospect list for planned giving committee's review

Make assignments for personal calls

Follow up personal calls with invitation/confirmation letter

Confirm arrangements for lunch

Develop handouts for guests

Evaluate event at committee meeting

### **Follow-up Letter to Estate Planning Professionals**

Dear ,

I was delighted to hear from (name of contact person) that you are interested in attending our luncheon for a small group of estate planning professionals that will take place (date, day, beginning time, ending time). We will start and end promptly in consideration of your time.

The luncheon presentation will consist of:

- \* An orientation to the work of our organization;
- \* A brief example of our ability to provide you with charitable trust tax calculations and income projections that can be of help to you and your clients;
- \* An optional tour of our facilities so you can see one of our programs in action..

Please return the enclosed card or call me at (phone number) to confirm your attendance. In case you have not visited us before, I enclose directions and parking instructions.

I look forward to meeting you at the luncheon.

Sincerely

### **Draft of Invitation to Estate Planning Professionals**

## Getting to Know (Name of Organization)

You are invited to a get-acquainted lunch at (name of organization, date, time and place of event). The lunch will provide a small group of local estate planning professionals with an inside view of the organization.

The meeting will also describe the agency's ability to provide you with tax and income calculations and specimen documents for a variety of charitable giving vehicles.

The presentation and lunch will end promptly at 1:30 p.m. A tour of our facilities will also be available.

(Directions to event location)

## **Welcome Letter Placed in Handout Given to Guests at Event**

Dear Estate Planning Professional,

Thank you for meeting with us today .

I hope you leave this afternoon with a better understanding of the work of (name of organization). We need professionals like you to be accurately informed about our mission and services.

I also hope that you will consider (name of organization) as a resource you can turn to. We can offer you technical information—tax and income calculations and specimen trust documents, for example—that may be of help to you in your work. If that occasion arises, do not hesitate to call our (name and number of contact person.)

We appreciate your giving us the opportunity of meeting with you today.

Sincerely,

## **Suggested Handout for Guests**

Include information that summarizes the services or programs you are highlighting at the event.

Include, if possible, examples of the kind of information you can offer them and their clients, e.g., an illustration of the tax and income consequences of a charitable trust.

Put this information in a file folder with a cover letter something like this:

Dear Estate Planning Professional:

As a service to you and your clients, and to encourage support of good causes, (Name of Organization) provides at no charge illustrations of the tax and income consequences of a variety of sophisticated charitable strategies. We can also provide you with specimen documents for charitable trusts and other charitable vehicles. Our illustrations and specimen documents include:

- Charitable remainder unitrusts
- Charitable remainder annuity trusts
- Charitable remainder trusts with a fixed term of years
- Charitable remainder trusts for one or two lives plus a term of years.
- Charitable remainder trusts funded with appreciated assets and retirement plans
- Charitable remainder trusts funded with partial interests of real estate
- Charitable remainder trusts used with irrevocable insurance trusts
- Charitable lead trusts

Charitable gift annuities  
Charitable pooled income funds  
Charitable life estate agreements

If information of this kind might be helpful to you and your clients, do not hesitate to call (name of contact and phone number.) We ask only that you inform your client that the illustration was provided by us as a public service. These illustrations are solely for educational purposes and are to be used only under the supervision of qualified legal counsel and with the review of qualified financial advisers.

Thank you for attending this luncheon meeting. Your interest in our work is deeply appreciated. To continue that work we are striving to increase our endowment. Endowments are usually built on bequests and other forms of planned giving. We hope we have demonstrated today why the agency may be worthy of your and your clients' consideration.

Sincerely,