

A Volunteer's Guide to Soliciting Planned Gifts

1. Keep the conversation *personal*. You are not presenting a planned giving "program" but talking about people who have cared enough about your organization to contribute significantly to it over the past few years. Give examples how some have done so through planned gifts: a simple bequest by one donor, a charitable trust by another.
2. Emphasize the *donor's* interests: note and comment on mementoes, family pictures, art work, and other signs of special interests. If the visit is not in the donor's home, make a special effort to draw the donor into conversation about his or her interests and needs.
3. Mention a few *facts* about your organization that you suspect the donor is not aware of: number of people served, physical changes at your facilities, annual budget, recent accomplishments and awards.
4. Be *clear*. You are with the donor to encourage him or her to become a member of the Legacy Circle by making a planned gift. State that clearly. "We are hoping you will consider becoming a member of the Legacy Circle by including our organization in your estate plan." Leave the Legacy Circle enrollment form and your general planned giving brochure with the donor.
5. Expect *objections*. Listen to them without interrupting. Acknowledge them. Answer them straightforwardly.
6. Be *helpful*. Point out simple ways to become a Legacy Circle member by naming your organization:
 - * **a beneficiary of a bequest through your Will or Trust**
 - * **a beneficiary on a life insurance policy**
 - * **a beneficiary in an IRA, retirement plan, or bank account**

If your organization has a pooled income fund, gift annuity program, or charitable trust information, let the donor know.

7. Conclude by thanking the donor for considering Legacy Circle membership.

Dear _____,

The Board of Trustees of our organization would like to enroll you in their Legacy Circle.

The Legacy Circle offers a practical way for you to provide for our organization, without affecting your current finances at all, through thoughtful estate planning.

Members of the Circle receive invitations to special events and educational programs, a personal certificate of membership, and their names inscribed on our Legacy Circle plaque.

Becoming a member of our organization's Legacy Circle is simple. All we need is to be told that our organization is in your estate plan. You qualify if you have remembered the organization:

- * **As a beneficiary of a bequest through your Will or Trust**
- * **As a beneficiary on a life insurance policy**
- * **As a beneficiary in an IRA, retirement plan, or bank account.**
- * **As a beneficiary of a charitable remainder trust or similar vehicle**

The purpose of our organization's Legacy Circle is to recognize those who have remembered it in their estate plan and, through their example, to encourage others to do the same.

Please let us know when your planned gift commitment is part of your estate plan. This kind of information is very valuable to us. If you do not want us to use your name publicly let us know, but we still hope to hear from you. The enclosed card is for your convenience. We hope to hear from you soon.

Sincerely,

(Volunteer's signature)
Planned Giving Committee

P.S. The accompanying flyer offers some useful planning strategies that can help you meet some of your personal and financial needs while providing future support for our organization.

Legacy Circle

I/we have already made provision to support your organization through our estate plan.
Check **(A)** or **(B)**.

A: You may list the name(s) below in the *Legacy Circle*.

B: Enroll me/us in the *Legacy Circle*, but do not use the names(s) listed below publicly.

Names(s) (Please print):

C: I/we have not made provision to support your organization through our estate plan, but _____ plan to do so.

D: Please send your free Wills Preparation Kit to:

Name: _____

Address: _____

City/State/Zip: _____

SCRIPT FOR VISIT TO PLANNED GIVING PROSPECT

The planned giving volunteer must convey a positive spirit toward the organization and a respectful concern for the donor's philanthropic, family and financial interests. The script below is only a warm-up exercise. It will come off as artificial, even manipulative, if it gets in the way of your genuine interest in both the prospect and the cause.

The volunteer's mission is to show the prospect that the organization deserves a place in the donor's estate plan. At the same time, the volunteer must also explain how the future good of the organization need not be in conflict with the donor's immediate financial and family obligations and that, in some cases, a planned gift can help with these more immediate concerns.

(Scene One: Act One: As the curtain rises, the planned giving volunteer and the prospect sit opposite each other in the prospect's living room.)

Vol: Those must be pictures of you children and grandchildren. How many do you have?

Don: Three children and four grandchildren. *(Encourage description of family or other interest such as present or past career, hobbies and cultural interests. Show the prospect you are interested in them and their family. Allow them to set the pace, and listen carefully.)*

Vol: *(The conversation roams over ground familiar and of interest to the prospect, with the prospect encouraged to talk, and the volunteer listening attentively.)*
Like any family, our organization needs to look beyond its immediate needs to the future. We are making these visits to encourage individuals like you to join our Legacy Circle. Have you heard of the Legacy Circle?

Don: No.

Vol: The Legacy Circle honors those who have included the organization in their estate plan. We are actively encouraging those who care about the organization to remember it in this way. (Clearly state the goal of your planned giving program as specifically as possible. If not much leaps to mind, see *Your Case* under *Getting Started*).

Don: Well, my estate is not that large, and I have my children to consider.

Vol: The philosophy of the Legacy Circle is that family comes first. Our Legacy Circle members take care of their family responsibilities, then leave a bequest to the organization as their means allow.

Don: What size bequest are you talking about?

Vol: Well, say someone gives us \$500 a year. For us to receive that amount every year, we would need about \$10,000 - 20 times their annual gift - to invest. This would be enough to create income that would keep their gift of \$500 coming every year. They would have provided a perpetual gift to our organization. Do you recall how many people the organization served last year?

Don: Not really,

Vol: As of this date we have served (number) people. (Also describe the long-term goals of the organization which planned gifts will support.) The members of the Legacy Circle lead by example. By making a bequest ourselves, we encourage others to do the same.

There are other ways of joining the Legacy Circle besides bequests. Do you recall the details of our pooled income fund and gift annuity programs?

Don: No.

Vol: They are part of our family-first theme. Donors put cash or stock into the fund or into a gift annuity contract and receive immediate tax benefits and lifetime payments. Donors can do the same thing with real estate subject to capital gains tax. Our organization can work with donors who would like to avoid that heavy tax and help the organization at the same time.

Don: Well, it's a lot to think about. I'm going to have to talk to my family about it.

Vol: Absolutely. Here's some information about planned giving and the Legacy Circle. Thank you for having us to your home, and we'll be keeping in touch with you.