

How to Market Bequests A Simple, Proven Plan

June 2018 | Tom Ahern

Harold Grinspoon Foundation
Jewish Federations of North America (JFNA)

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30,000 feet

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How to DOUBLE your fundraising revenue

- Move 10% of your donors to monthly giving.
- Persuade about 3% of your donors to upgrade their giving to the \$500 level or higher.
- **Get 5% of your donors to include you in their Wills.**

Hilborn Charity eNEWS, via Future Fundraising Now, 2017

The Plan



How to market bequests (minimum)

- Make a list of anyone who's given 3 times or more.
- Create a Legacy Society (a special group to join and be honored by).
- Send your list a letter once a year, asking them to consider joining your Legacy Society by adding charity to their Wills.
- Repeat ad infinitum.

Good news

American Jews provide for charities in their wills nearly twice as much as people of other faiths, a new study shows.

Source: Connected to Give: Jewish Legacies, via Jewish News of Northern CA, 2013

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Forty-five percent of Jews who belong to Jewish organizations make charitable gifts in their wills, compared with 15 percent of Jews who don't affiliate, the study found.

Source: Connected to Give: Jewish Legacies, via Jewish News of Northern CA, 2013

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Some 74 percent of Jews have wills,
compared with 60 percent of non-Jews,
according to the study.

Source: Connected to Give: Jewish Legacies, via Jewish News of Northern CA, 2013

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- (1) Most American Jews are charitable givers,
- (2) Most Jews who make charitable contributions give to both Jewish and non-Jewish organizations,
- (3) Engagement with Jewish community is a paramount driver of Jewish charitable giving and even drives giving to non-Jewish organizations,
- (4) As the income levels of American Jews rise, so do all measures of their charitable giving, and
- (5) Although age is not a driving factor in the incidence and amount of charitable giving overall, younger Jews clearly are less likely to give to Jewish organizations.

Source: *Connected to Give: Key Findings* (Gerstein, Cohen and Landres)

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Had your predecessor 10 years ago fired up a competent bequest marketing program, today your organization would be **swimming** in money.

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“I see so many small organizations on these never-ending event & grant treadmills....”

Source: Pam Grow, 2018, 20K Twitter followers

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How bequests saved a charity...

	2011	2012	2013	2014	2015	2016
TOTAL	\$4,517,759	\$5,154,302	\$6,653,715	\$5,320,060	\$5,729,104	\$6,345,489
bequests	\$731,643	\$745,751	\$2,258,660	\$1,912,605	\$2,521,307	\$2,510,340
annual donors	21,846	21,017	19,872	17,508	16,893	15,484

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Had your predecessor 10 years ago fired up a competent bequest marketing program, today your organization would be **swimming** in money.

So, what's your excuse?

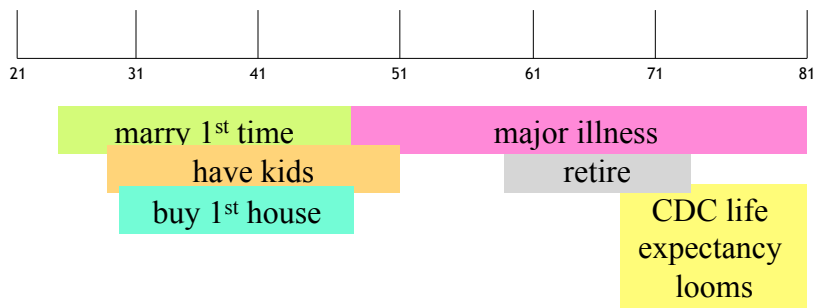
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It takes **one letter annually.**

Put bequest marketing on
your calendar **for next
week.** Nothing happens
until you start.

Soon, too

The're called "life events."
You have them, too.



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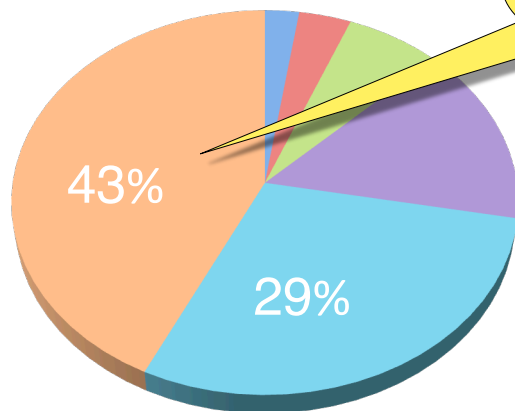
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WHAT are you waiting for ????

When did people leaving a gift to charity in 2015 write/amend their wills?

Source: Mark Phillips, Bluefrog



Bequests come in quicker than you might assume = within 1-4 years.

- Pre 1990
- 1991 to 1995
- 1996 to 2000
- 2001 to 2005
- 2006 to 2010
- 2011 to 2015

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Donor who?

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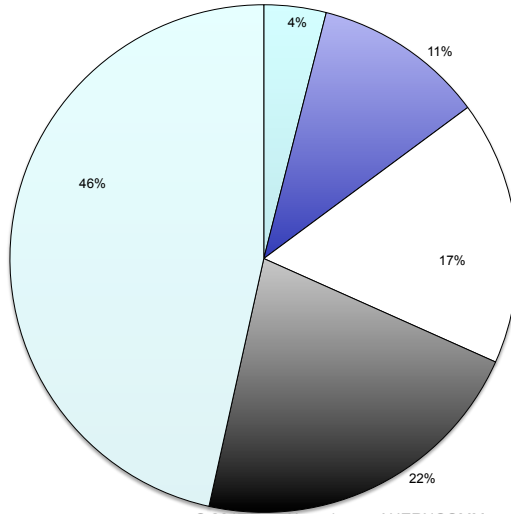
Her!

And that's all she wants from **your** organization.

Source: Mark Phillips, Bluefrog

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Donors by age (percentage)



- <35
- 35-44
- 45-54
- 55-64
- 65+

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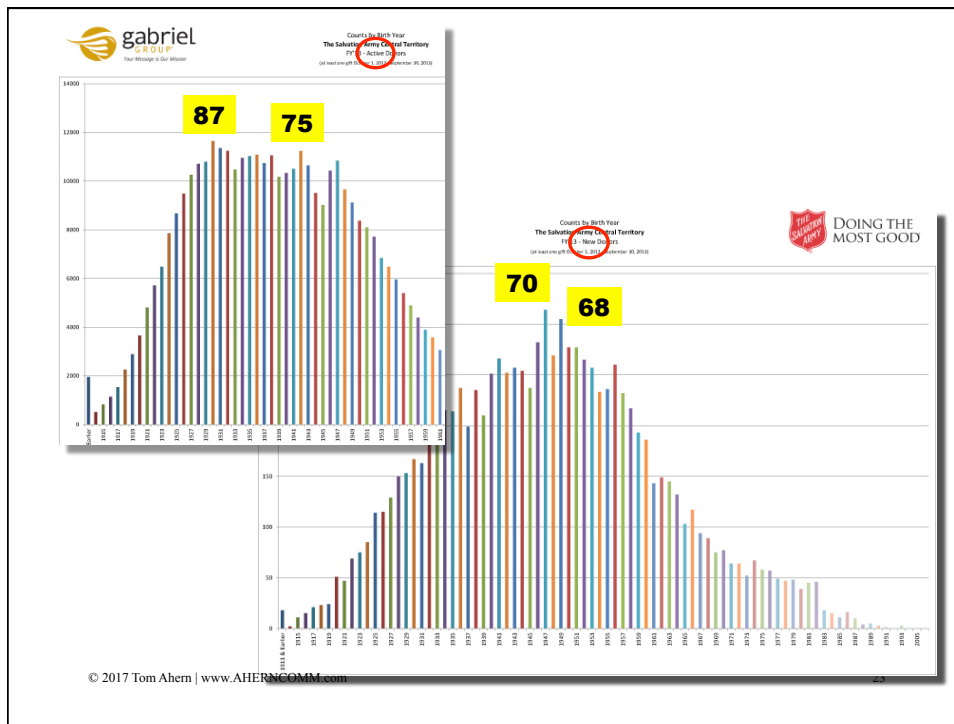


**Big nonprofit
community hospital
system in California**

75
exactly

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88% of dollars raised comes from 12% of the donors

~ Jay Love, Bloomerang, April 2017, via Pam Grow;
translation: the “true believers” make the biggest difference

How do you start a miracle growing? You plant a gift in your will.

"Medical miracles" in children's health care ...
... those breathtaking advances that, when you first hear of them, seem almost impossible to believe ...
... can often be traced back to just two things:

1. an idea in the right mind; and ...
2. enough philanthropic investment to transform that wonderful idea into a healing reality.

There are several types of [bequests](#) that allow you to designate how your estate will be distributed.

Specific Bequest:

You describe exactly what you want to leave to a specific individual or organization and the designated source. If you want to leave a specific dollar amount from a specific source or a particular item (such as an antique or collector's item), this is the type of bequest that you would use.

Example: Kathryn states in her will: "I leave my diamond engagement ring to my granddaughter, Sarah. I also leave my securities to The Nature Conservancy."

General Bequest:

This type of bequest does not specify the source from which it should be paid. This gives your executor the flexibility to honor the bequest from any available source.

Example: Kathryn states in her will: "I leave \$50,000 to my son, William."

Residuary Bequest:

This type of bequest is honored after all other bequests have been made, and all debts, expenses and taxes have been paid.

Example: Kathryn states in her will: "I give all the rest, residue and remainder of my real and personal estate to The Nature Conservancy."

Contingent Bequest:

This type of bequest is fulfilled if certain conditions are met. For instance, if your primary beneficiary does not survive you, you can indicate your next choice through a contingent designation.

Example: Kathryn states in her will: "I give all the rest, residue and remainder of my real and personal estate to my husband, John, if he survives me; if not, then 50 percent in equal shares to my children who survive me and 50 percent to The Nature Conservancy."

Source: The Nature Conservancy, 2018

What's the prize?

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Comparisons of Lifetime Value

- LTV of a one-time donor (U lose \$): **\$50/average?**
- Gives same amount for 10 years (rare): **\$500**
- Converts to \$10/monthly gift for 10 years (takes work): **around \$1,200**
- Becomes a \$1,000/annual donor: **around \$9,000**
- Leaves a charitable bequest: **\$50,000 or more**

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“All but the biggest major gifts are chicken feed in comparison to legacies.”

Stephen Pidgeon, *How to Love Your Donors (to Death)* (2014)



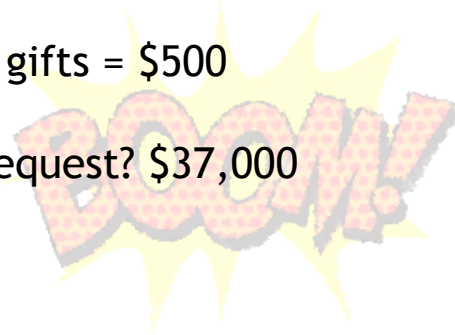
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A bequest EXPLODES the lifetime value of a donor you already have!!!!

LTV: 10 years of \$50 gifts = \$500

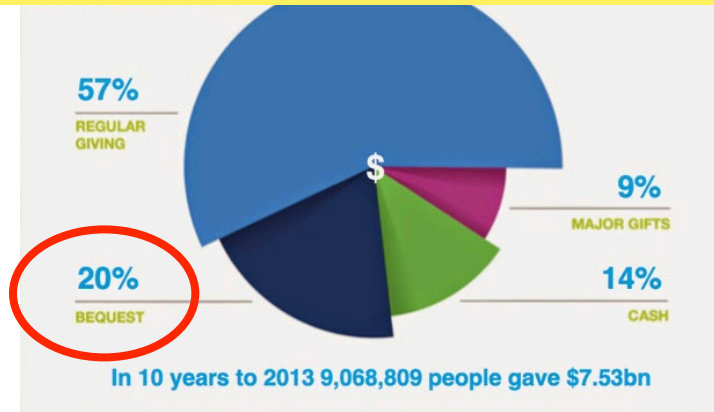
Avg. US charitable bequest? \$37,000



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Sources of giving in Australia



Source: Pareto Fundraising

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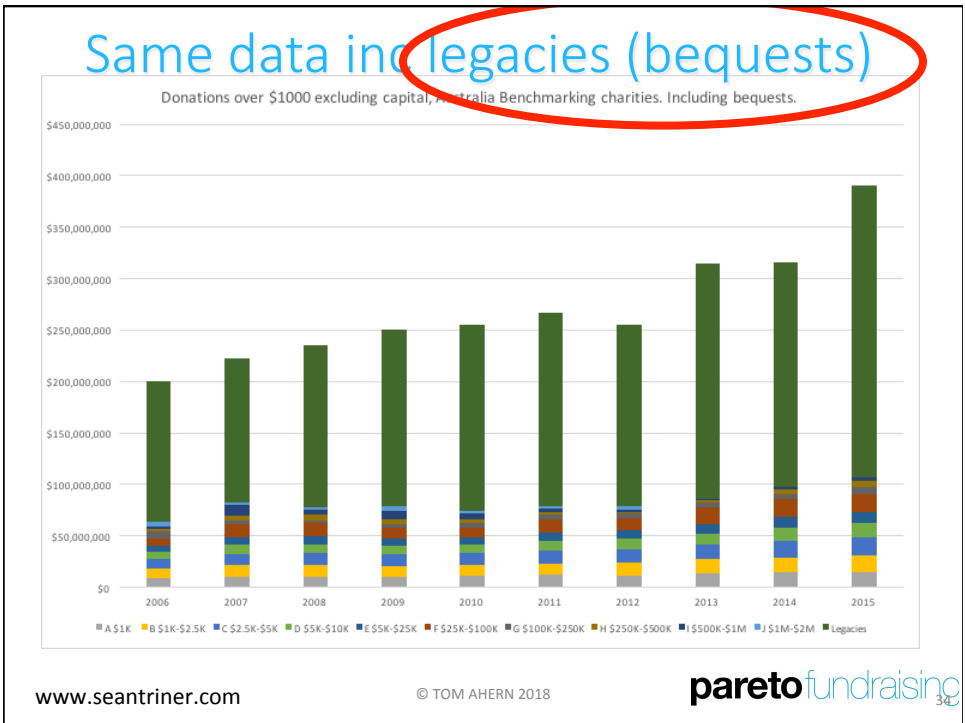
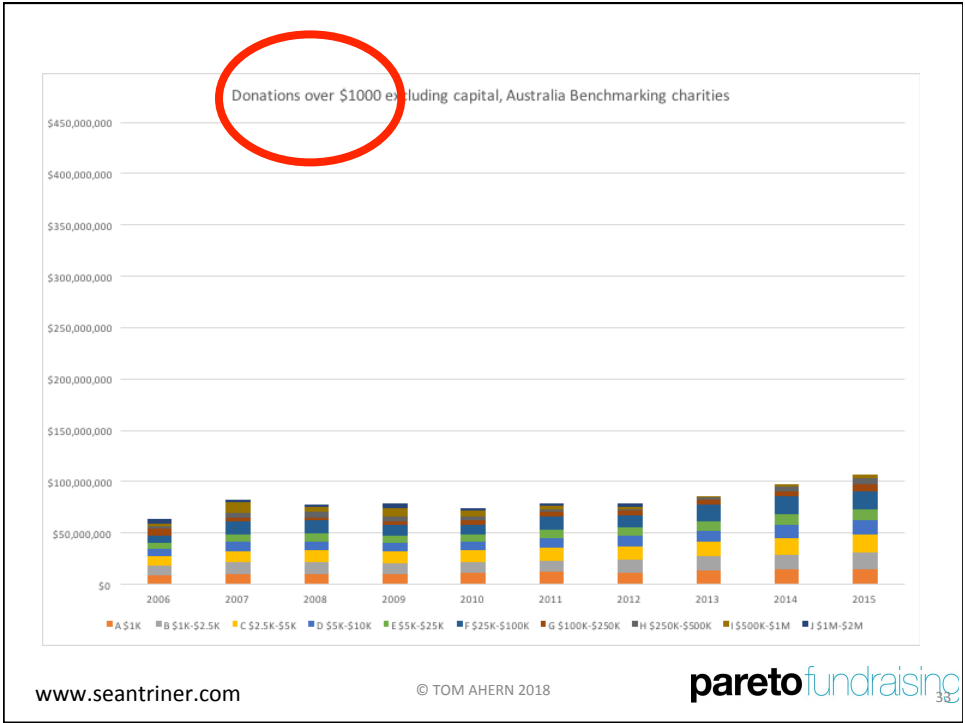
State of the DoNation 2014



Source: Pareto 2015

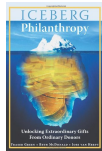
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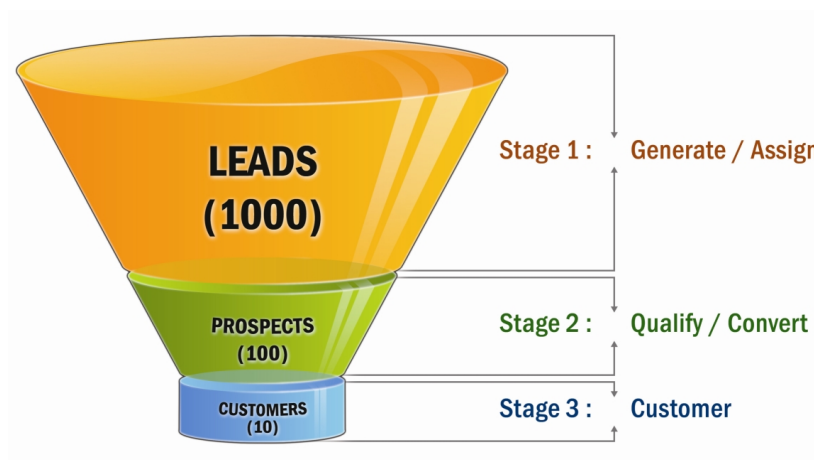


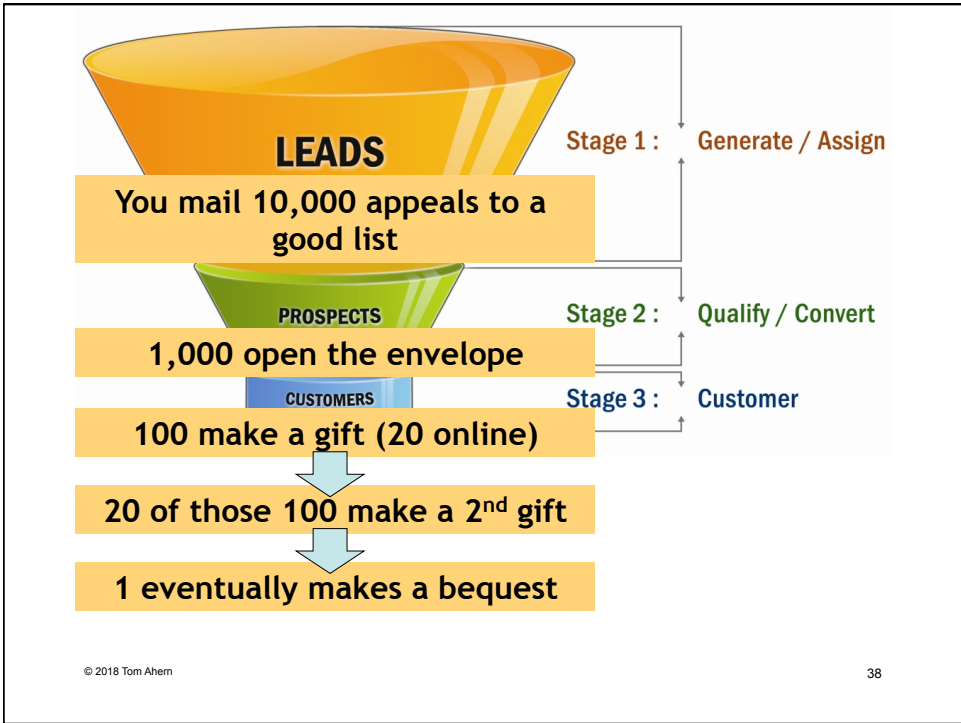
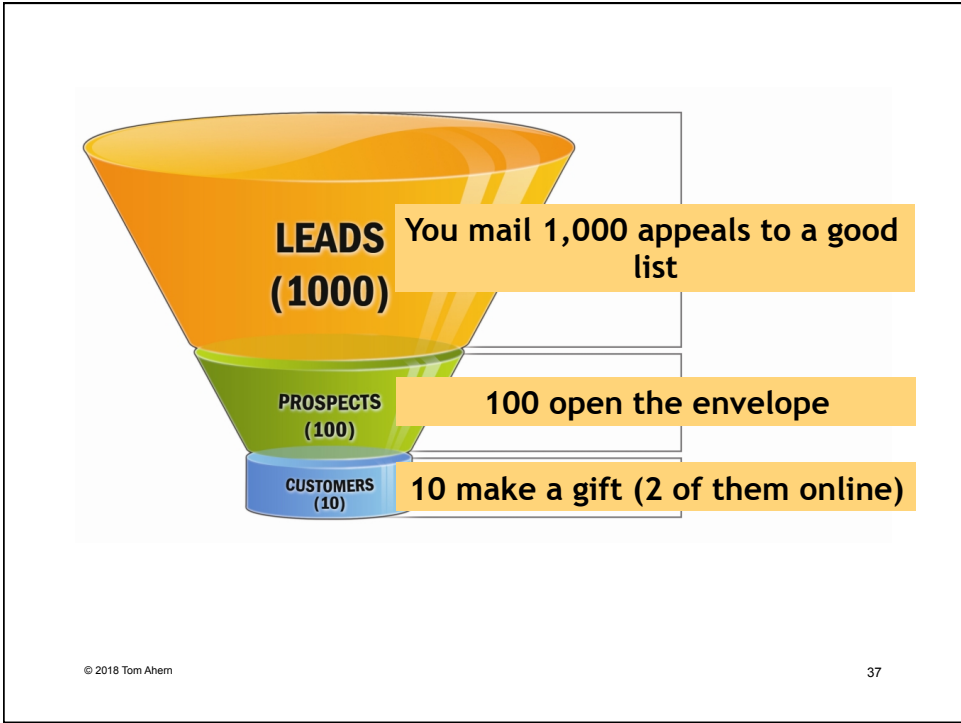
“Direct mail programs typically spend a dollar to make two or three dollars over the course of a year. **Legacy marketing pays off at a ratio of 20 to one or better.**”

Underestimated, probably



Source: original research in Iceberg Philanthropy, 2007





The rich are irrelevant.
(Good to know.)

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...there is **no correlation**
between either income or
wealth with the likelihood of
giving by bequest.

Source: Mal Warwick, quoting Robert F. Sharpe, Jr., around 2005

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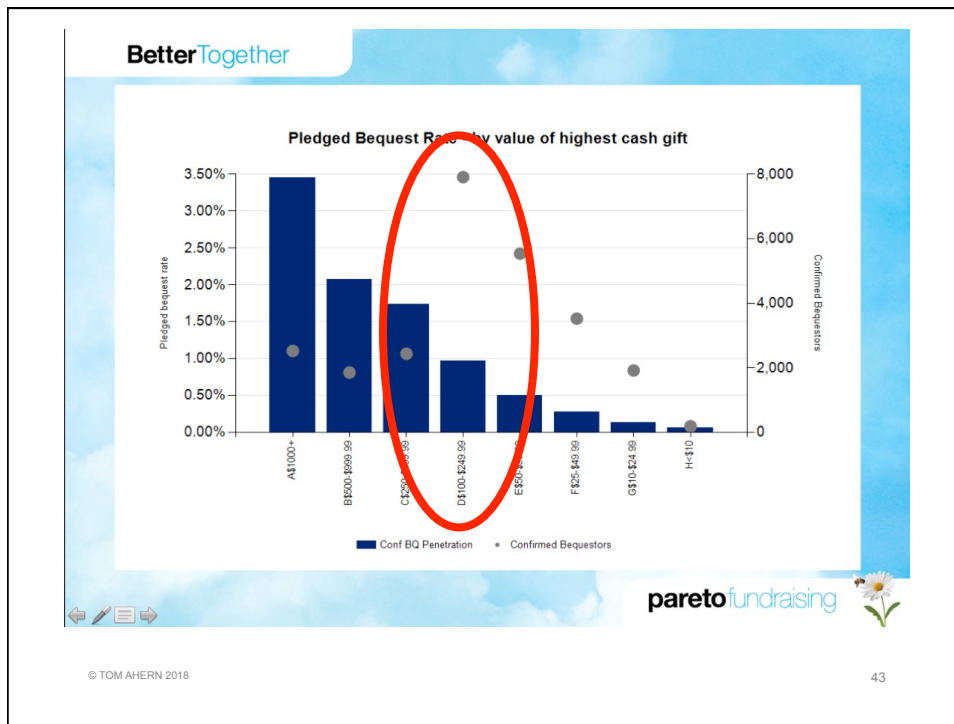


[Bequest] marketing ... is about **getting a small number of very large gifts from your 'average' donors.** These are the donors who aren't on your radar screen already, who aren't interested in tea and banana bread with a planned giving officer, but who are **very loyal to your cause.**

It may seem counterintuitive, but actually, those with the greatest net worth are not normally your best or most likely prospects for a bequest.

You need to look for men and women who are long term and consistent donors. This is especially true of those who give four or more times a year, several hundred dollars a year. They are your very best prospects for a bequest.

The greatest percentage by far are bequests from men and women who leave estates of \$2 million or less.



“The ASPCA asked this question of its database: Who exactly leaves us bequests? The answer: donors **who give often but not very much.**”

Kevin Schulman, DonorVoice webinar, Sept 2016

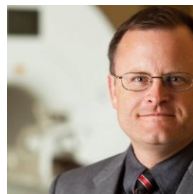
Trending

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The strongest predictor of likelihood that
someone will make a charitable bequest:

childlessness



Source: Russell James III, 2014

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In Australia, Germany, Italy and the US, the proportion of childlessness among women in their late 40s has doubled over the past three decades.

2012 Yale Center for the Study of Globalization

Start a legacy society.
(Why? Exclusivity trigger.)

Common emotional triggers used by copywriting pros in fundraising

Anger

Duty

Exclusivity

Fear

Flattery

Greed

Guilt

Hope

Salvation

“You can’t thank them when they’re dead.”

RHODE ISLAND FOUNDATION

Transforming Rhode Island Working Together Inside the Foundation

The 1916 Society

SHARE

We are pleased to introduce the members of the 1916 Society, individuals who have named the Foundation in their estate plans or have established deferred gifts, and to thank each member for his/her commitment to improving the community.

- ✓ Anonymous (58)
- ✓ Michael and Roberta Hazen Aaronson
- ✓ Noreen Ackerman
- ✓ William and Amabel Allen
- ✓ William R. and Marlies H. Allen
- ✓ Patty and Melvin Alperin
- ✓ Berndt W. Anderson

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WHAT MAKES DONORS GIVE?

Hope Protest Change Pride Belief Belonging

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pinion sports soccer tech arts lifestyle fashion business travel environm
 pe americas asia middle east africa australia cities development

Jewish community centers in US receive nearly 50 bomb threats in 2017 so far

- Most recent call prompted evacuations of 14 Jewish organizations
- Antisemitic incidents have been on rise since Trump election, officials say



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“Dr. Death,” Richard Radcliffe



“A legacy is not a donation. It’s an investment.”

“Leave a legacy” is about **perpetuating** *my* values and *my* beliefs and *my* primal desire to matter ... at a price I can easily afford, because I’ ll be dead.

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Start a legacy society.
(Why? Social proof.)



Source: Russell James III, 2014

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Why Do I Support Chabad at Penn?

"Chabad was a second home to me when I was a student at Penn, I always looked forward to Shabbat with Rabbi Levi and Nechama, and I am excited to be able to support Chabad at Penn for future generations of students."

Daniela (Malekan) Gershel C10

"Before 'safe space' became a household term on college campuses, Chabad was a safe space of the best kind and with all of the best connotations. As soon as you step into the building, you're accepted and welcomed. Practices that were foreign become familiar. Silly questions don't seem silly. Differences in level of observance are eclipsed by what we all have in common. The hardest topics to address are embraced, not ignored. Before I came to Chabad, I felt a connection to other Jews because of our shared history. After coming to Chabad, I began to feel connected because of our shared present and our anticipated shared future. It's an experience that every student should have."

Jessica (Levy) Kamis, C'09, W'09

"A few years ago, my wife and I had the opportunity to attend Shabbat at two different Chabads at colleges with our daughter. It was inspiring and actually somewhat surprising to me to see the level of participation and enthusiasm of the students for connecting with Judaism, not what I did at that age. For me, it defined Judaism as it relates to a college-age person. At that age, a person is making many decisions that guide the rest of his/her life. Chabad on Campus will help them establish a strong, thriving and joyous Jewish home with their family for generations to come. Thank you for all that you do."

Mr. Larry Sifen, Norfolk, VA

THANK YOU FOR YOUR GENEROUS SUPPORT

This is **social proof**.



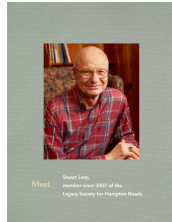
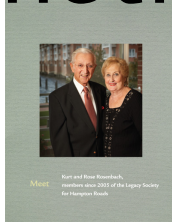
Meet

Tim Bostic and Tony London, members since 2007 of the Legacy Society for Hampton Roads

What is "social proof"?

"Hey, look! People like me do things like that..."

“Synthetic family”



Editor: Sally Kirby Hartman

Legacy & Endowment

WRITE YOUR LEGACY

Where's the social proof?

Family Tree Legacy Circle

Whether your estate is large, modest or somewhere in-between, you can help ensure that JFS will not only meet the needs of our "family" today but will also be here tomorrow to assist our children and our children's children.

Legacy giving (sometimes called planned giving) strengthens the community that JFS serves and, in many instances, also provides you with tax advantages. It ensures that you will be remembered both by those who directly benefit from your generosity to JFS as well as those who will be inspired by your example as a member of our Family Tree Legacy Circle.

The Family Tree Legacy Circle recognizes supporters who have made a monetary gift to the JFS Endowment in their lifetime, have informed us of their intent to leave a bequest to JFS or those of blessed memory who have already left such a gift. FTLC supporters make a lasting statement of their values and provide funds to continue their commitment to JFS and the community.

If you have included JFS in your estate plans, please let us know. We would be honored to thank you and include you in the Family Tree Legacy Circle.

Bequests

The most common form of legacy giving is a gift described in your will, commonly called a bequest. A bequest affords you flexibility and control over the legacy you leave. For some donors, it also means a portion of your

Source: Seattle JFS 2018

Look to your board first.

Encourage ALL board members to make bequests ... and publicize these in your newsletter and other publications. Source: Marts & Lundy.

“I always find the best way to get rid of a bad board member is to ask them for a legacy - they usually resign on the spot!”

Richard Radcliffe, 2018

Keep your expectations in check...

“A recent look at one charity I've worked with found 50% of those saying they had left a gift in their will had gone on to do so.”

Stephen George, Sept 2016

The advantage of endowment?
Eternity of a sort



How do we deal with the existential challenge of knowing we're mortal?
 We seek “symbolic immortality.”

Dr. Claire Routley

A hot meal. A good home.

How Will You Be Remembered?

Leaving a gift in your will to Merchants Quay Ireland is a once in a lifetime chance to see that the homeless and those who struggle to overcome addiction have somewhere to turn for help, even after you're gone.

And for your kindness, we'll always remember you. To learn how easy it is to leave a legacy gift to Merchants Quay, ring Denisa on 01 524 0115.



MQI's Stabilisation Programme...

(continued from front page)

connected with any other teams to make sure they are looked after.

MQI: What life skills are they learning?

would have missed out on things in secondary school level. The emphasis is always on personal development. There are loads of projects, visits to art galleries, education programmes. The local employment services know we are here now. Stabilisation is a process of listening and trust and confidence building.

What's On at MQI?

Read All About It:

- **Just Released:** 2009 Annual Review reveals a 'rising tide of desperation' for people who are homeless; to read the review go to www.mqi.ie
- **MQI on Facebook:** Listen to client interviews and get the latest media updates on Merchants Quay's Facebook Page
- **Drug-Free Pilot Programme:** New day programme offers ongoing structure, education and counselling for clients who recently completed drug rehab
- **Scholarship Fund** to help keep education within reach for clients, page 3
- **New Aftercare House in Leixlip:** Grows capacity by 200%; provides six more places for aftercare housing and support in

Source: Lisa Sargent

What he saw in permanent endowment: “He liked the fact that he will be doing something good with his money long after he is gone.”

Source: Sally Kirby Hartman, 2015

Oldest endowment?

Est. by bequest 1249 at Oxford.

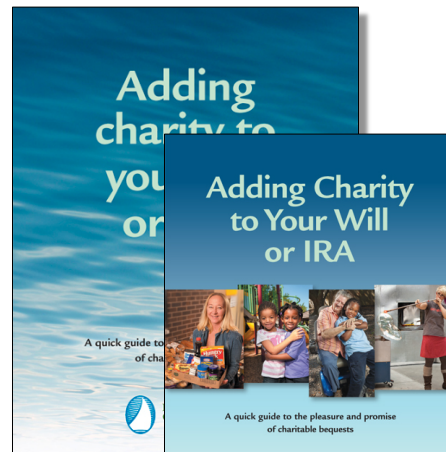


Have an offer for info.
(It's a multi-step sale.)

A plain-spoken
information piece
people can
request.

> No jargon!

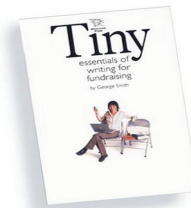
2011



2015

All fundraising copy should sound like someone talking.

-- George Smith, *Tiny Essentials of Writing for Fundraising*



How does it work?

It's pretty simple,
once you decide to save the world...
Or your local library.

Frequently Asked Questions

Q. Why should I make my bequest through The Rhode Island Foundation? Why not leave a gift directly to a charity?

A. The Rhode Island Foundation is a permanent institution, founded in 1916. Decades from now, centuries from now for that matter, The Rhode Island Foundation will still be here. And your bequest will still be hard at work, making grants to the charities and causes you care about most.

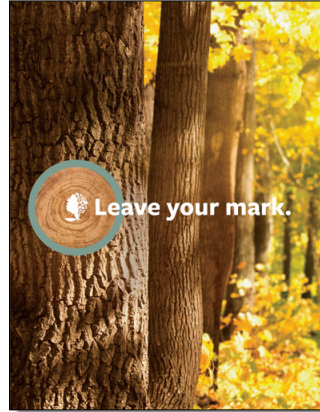
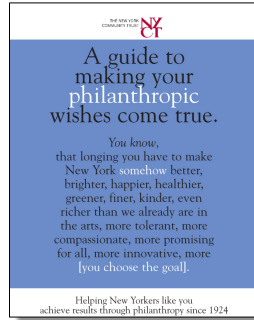
Q. Is it difficult to make a charitable bequest?

A. Not at all. You can do it today, with a call to your lawyer, if you already have a will. Or call the Bequest Department at The Rhode Island Foundation (401-274-4564). We'll answer your questions.



“Dr. Death,” mega-researcher Richard Radcliffe

“Joy Brochure,” not a “Death Brochure.”



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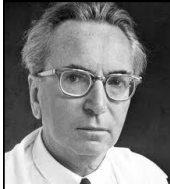
**Stuff I've
learned from
great Brits**

“Fundraising is NOT about money.”

Source: UK fundraisers going back to the 1960s

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Source: Neurologist and psychiatrist Viktor Frankl, via the For Impact blog

“Humans are driven by a will to establish meaning in their lives. They need purpose.”

That’s your real job, in donor communications: to bestow purpose in exchange for support.

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Essential point from “Dr. Death,” Richard Radcliffe



“Bequests are life-driven, death activated....”

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Key brochure messages

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A bequest could be the most important charitable gift you ever make.

A bequest could be the most important charitable gift you ever make.

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Here are a couple of good reasons why.

Reason #1: A permanently endowed fund is forever.

How forever is forever, you might reasonably ask? In England, there are college endowments that go back five centuries.

Here, in our newly formed country, in 1790, Benjamin Franklin endowed, through a bequest, a fund to benefit the people of Philadelphia and Pennsylvania. That fund fulfilled his wishes for more than two centuries.

The Community Foundation for Greater New Haven itself began with a bequest in 1948 from Nettie J. Dayton. From that day to this, we've never spent a penny of her principal. That's "forever" as we know it.

When you leave a charitable gift in your will to permanently endow a fund, you are guaranteed that:

- your fund will exist in perpetuity;
- your fund will make gifts annually to charity;
- your fund, on average, will grow every year.

Which, in our view, is as "forever" as a reasonable person can predict.

Reason #2: You can protect your heirs — and still give to charity.

Some people in their wills specify a certain dollar amount, say, a \$50,000 charitable bequest to set up a named endowment at The Foundation. Some specify a percentage of an entire estate; say, 10 percent of a net worth, or 5 percent of an entire estate.

And others put family first and then charity. They specify a "residuary bequest" — to examine the options, see the Community Foundation for Greater New Haven website.

LIVE FOREVER LIKE Virginia

Virginia Glennan Ferguson was an upbeat, people-loving Virginia Beach widow who loved parties, traveling and helping people in need.

Although this friendly Norfolk native passed away in 2012 at age 96, today she helps others by sponsoring Eastern Virginia Medical School geriatric lectures and Together We Can programs to help at-risk area teens thrive. Thanks to Virginia's charitable bequest to her community foundation, she will forever be remembered as a positive force for good in the region she loved.

Live forever through your generosity. Learn how by calling (757) 622-7931 or visiting leaveabequest.org.

Hampton Roads Community Foundation

Writer: Sally Kirby Hartman

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Mary DiDonato
Retired nurse

Mary DiDonato has spent more than half a century caring for local cancer patients. A nurse of nearly 50 years, Mary retired for a second time in 2014 at the age of 84. Ever healthy, Mary continues to help those struggling with cancer by volunteering and supporting research for breast cancer's National Cancer Institute.

Through a gift in her will, Mary will continue to provide the same physical, mental and spiritual hope to those faced with a cancer diagnosis. Her gift will fund the Mary DiDonato Fund.

Marc & Sylvia Trundle
Police officers

Marc and Sylvia Trundle have dedicated their careers to improving the community. Marc is a 33-year veteran of the Tallmadge Police Department. Sylvia, the Fairlawn Police Department's first female patrol officer, continues to lead a ground-breaking career as a captain in the Akron Police Department.

And while they may have chosen their career in law enforcement for different reasons, Akron residents both believe in the power of paying it forward, and they're equipping others to do the same.

Marc and Sylvia are donating a percentage of their estate to start a scholarship fund at Akron Community Foundation. Through it, they will help local young people pursue a career in criminal justice at the University of Akron.

"We're getting to that age, and with no children, we had to decide where our money would go," Marc said. That led them to Akron Community Foundation. "With their ties to the community and history of helping people, we thought, 'Who else?'"

Sylvia says their goals are twofold: to help hard-working students carry their torch of public service, and to encourage philanthropy. "If someone Googled us," she says, "it wouldn't hurt to see we were involved in the community, we loved our department, we gave back. The old folks that donated the money? That's what they were about."

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Heirs first, charity second.

For many, loved ones are the first priority in estate planning, and understandably so. But, frequently, charitable giving through your estate lessens the tax burden on your heirs while establishing your legacy.

Consider these options to ensure you care for your family and friends in the most beneficial way:

1. Earmark a set dollar amount – say \$50,000 – that you are comfortable using to start your endowed charitable fund.
2. Dedicate a specific percentage of your estate to start your fund, so you know that your family will receive the share you want them to have.
3. Leave a residuary bequest to start your fund. The residuary is what remains of your estate after other distributions have been made.

In most cases, it is best to donate your most highly taxable assets. Consider a retirement plan (as an IRA, 401(k), 403(b) or pension, if the IRAs were given to your family, much of the value may be lost through estate and income taxes. But, if you use retirement assets to start your endowed charitable fund, not only is the full value of your gift transferred to your fund tax-free, your estate will benefit from an estate tax charitable deduction.

Learn more about your options at www.MyAkronLegacy.org.

Family first....

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People want to give back.
A legacy gift is a fabulous way to do just that.

Jerry Wolf

Retired teacher and administrator

As a junior in the Jackson High School marching band, Jerry Wolf met a flashy young maestro who inspired him to turn his talent into a profession.

For 29 years, Jerry did just that, himself inspiring students in the Southeast, Waterloo and Mogadore school districts – first as a band director, then as a principal. “I believe I made a difference. In return, they kept me feeling young,” he says.

Still in his 50s, Jerry is young for a retiree. And although he has no children, Jerry realizes the importance of saving for future needs and providing for his loved ones.

He also wants to give back.

A financial advisor recommended Jerry reach out to a community foundation in his area, so he worked with Akron Community Foundation to start an endowed charitable fund. Upon his passing, Jerry's traditional IRA will transfer 100 percent tax-free into his fund. He chose to donate the IRA in order to minimize tax consequences while providing a significant, perpetual source of inspiration for students in each of his three former districts. Ultimately, the fund will provide scholarships to graduating seniors.

“It's paying back and paying forward,” Jerry says, “and my family will still be well taken care of.”



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NEVER stop talking about it

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“Drip, drip, drip. Planned gifts are prompted by life events – death, birth, marriage, health, travel, retirement.” [People write or rewrite a will on such occasions.] “That’s why it’s so important to have a regular cadence of marketing messages. Because you never know when the time might be right.”

Source: 2012, Jeff Comfort, Georgetown; via Phyllis Freedman’s Planned Giving blog

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Create your own ripple effect

Whether you are taking those first important steps toward planning your estate or preparing to update your plan, you can create your own ripple effect through your estate plan. Please tuck this card in with your important papers to help you remember the river in your plans.

If you've already remembered the Ipswich River in your plan, thank you! Please let us know so we can thank you properly and recognize your generous help.

Please call Tish at 978.412.8200, email her at taldich@ipswichriver.org or visit ipswichriver.org for sample language. All inquiries are confidential and at no obligation.

"Eventually, all things merge into one, and a river runs through it." — Norman MacLean



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Send reminders

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“15-second spots on public radio work best for us.”

Hampton Roads Community Foundation, 2015

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“Support comes from Hampton Roads Community Foundation. Teacher Byron Babcock died in 2009. Today he helps communities and schools encourage struggling students to succeed. Visit Leave a Bequest.org to learn how you can live forever through philanthropy.”

In email
footers:

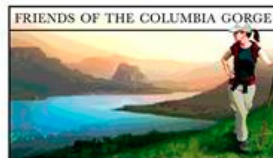
Kate Harbour

Membership Coordinator, Friends of the Columbia Gorge

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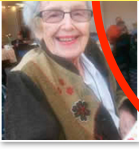
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Read how Hampton Roads residents plan to use their wills for good in our community. Have this inspiring how-to bequest guide **mailed to you** today or **download** a copy now. **Learn more** about ways to give back to your community forever.

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in serving neighborhoods," says Michael Ferguson, executive director of The Planning Council. "Foundation investments in bricks and mortar, people, services, planning and outcome measures" are all part of the solution.

The January merger of the Norfolk and Virginia Beach foundations "helps us in our work," says Andrew Friedman, director of housing and neighborhood preservation for the City of Virginia Beach. "Tackling these issues can't be done

Seton Youth Shelter
St. Columba Eucharistical Shelter
United Way of South Hampton Roads
Union Mission Ministries
Virginia Beach Community Development Corp.
Virginia Supportive Housing
YWCA of South Hampton Roads

Total: \$2,397,166

since 2001 were for an array of purposes - building and repairing homeless shelters, transitional housing and permanent housing, providing operating support, starting children's programs, buying vans and computers, providing salaries for housing specialists, and being a coordinator for regional housing programs and planning.

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Ettie's will said a lot about her.
What does your will say about you?

Although Norfolk math teacher Ettie Fearing Cunningham died in 1989, she and her beloved husband Robert, who died before her, live forever because of the gift she put in her will.

Cunningham Scholarships are helping 22 students attend college this year. Hundreds of past recipients - some of them honored as teachers of the year - are already making our world a better place.

Order your free bequest guide to learn how easy it is to leave a gift for your life's passion. Call us at 757-622-7951 or visit leaveabequest.org.



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Barbara's will
said a lot about her.

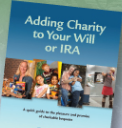
What does your will
say about you?

Norfolk banker Barbara Upton Wilson loved being outdoors and having pets. Although she died in 2013, today Barbara is helping expand Portsmouth's Paradise Creek Nature Park and also give shelter animals better lives.

Barbara will forever do good works in her home region because of her charitable bequest to the Hampton Roads Community Foundation.




Invest in the future by letting your will say a lot about you. Call us at (757) 622-7951 or visit leaveabequest.org.



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Bill's will
said a lot about him.

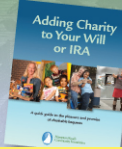

What does your will
say about you?



Norfolk businessman Bill Goldback valued the arts and good health. Although Bill died in 2007, he helps organizations like The Hurrah Players and Eastern Virginia Medical School do great work.

Bill will forever help people in their home region because of his charitable bequest to the Hampton Roads Community Foundation.

Connect your passions to the future by letting your will say a lot about you. Call us at (757) 622-7951 or visit leaveabequest.org.

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“Hero Shot”

Ads in publications your donors will see

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Essential!

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“It never occurred to me!”

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Send your best
prospects a special
letter every year,
warmly inviting them to
join the Legacy Society.

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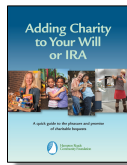
My
simple
letter
formula

Opening: Thank your donor deeply ... humbly ... for years of help.

Middle: Put the Legacy Society offer in front of them, without coyness. Ask for their consideration, not an immediate action. "Next time you review...."

End: Thank your donor some more.

PS: Offer free information about charitable bequests.



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