

LEGACY CONVERSATIONS

Engaging Donors with Empathy and Clarity



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OBJECTIVES

1

Understanding
empathetic
and persuasive
communication

2

Exploring
donor-centered
messaging

3

Practicing real-
world legacy
giving
conversations



WHAT IS LEGACY GIVING?

A gift or a commitment?

What is an endowment?

Why do we need one?



HOW TO MAKE IT HAPPEN

Bequest in a will or trust

Beneficiary designations

Qualified Charitable Distributions
(QCDs)

Complex Assets like real estate



BE HONEST & AUTHENTIC

Listen more than you speak

Curiosity builds trust

You don't have to have all the answers

Legacy giving is personal—meet people where they are



WHAT IS EQ?

Emotional Intelligence (EQ) is the ability to recognize, understand, and respond to your own emotions and the emotions of others.

Helps you stay present, patient, and empathetic in meaningful conversations



DONOR PSYCHOLOGY

Motivators: values,
impact, memory,
name

Concerns: family
needs, outliving
assets, complexity,
lack of trust



DONOR TYPE – ANALYTICAL



Motivated by logic, numbers, impact



Trigger phrases: “What kind of return does this generate?”



Tips: Provide data, follow-up with examples



DONOR TYPE – RELATIONAL



Motivated by connection, shared values



Trigger phrases: “This reminds me of my grandfather...”



Tips: Affirm emotions, connect to community



DONOR TYPE – MISSION-DRIVEN



Motivated by purpose and impact



Trigger phrases: “This work matters to me.”



Tips: Emphasize mission and long-term change



Empathy is listening to understand not to respond.



- “Thank you for sharing that—it means a lot that you feel comfortable telling me.”
- “That’s such a meaningful story. I can see how much it shaped your values.”
- “I really appreciate you opening up about this—it’s not always easy to talk about.”





SETTING THE APPOINTMENT

Introduce the conversation gently

“I would love to get together with you to talk about the vision for _____. You have a been a long-time supporter and ambassador and it would be wonderful to see how you could be a part of that vision”

“Have you ever thought about the kind of legacy you want to leave for future generations? (Pause) – May I meet with you to learn more and invite you to join our Legacy Society?”

“What inspires you to support _____? Would you be open to meeting with me to consider the many ways we can honor your lifetime of giving by inviting you to become a Legacy Society Member?”

“Many of our supporters tell us they want to make an impact beyond their lifetime. Is that something you’ve ever thought about? Can we meet so I can learn more and to share our vision of our Legacy Society?”



THE LAYERED APPROACH

- ✓ **You know** how much we appreciate your involvement with _____ and we love seeing you at ‘services, grandparents’ day’ etc.
- ✓ **You understand** the importance of planning and the need to provide sustainability for our future ‘members, students’ etc
- ✓ **Would you consider** getting together with me to talk about what that looks like and how you may be able to play a role and at the same time, honor your lifetime of giving?



WHEN YOU DO EXPLAIN LEGACY GIVING



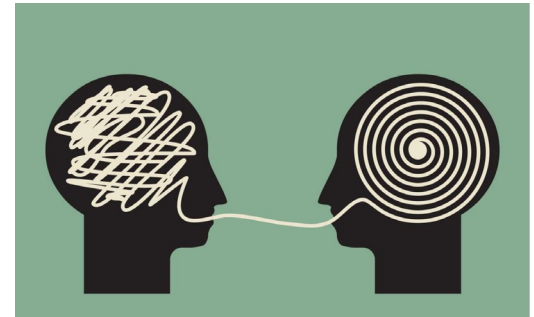
“A legacy gift or commitment is a way to support the causes you care about long into the future and a way to honor your lifetime of giving.”



“It could be as simple as including [Organization] in your will or naming us as a beneficiary of an account.”



“It’s not just for wealthy people—anyone can make a meaningful gift.”



Use clear
non-jargon
language



SUPPORTIVE NEXT STEPS WHEN SOMEONE SHOWS INTEREST



- “Would you like to talk more about what a legacy gift or commitment could look like for you?”
- “If it’s helpful, I can share a few examples of what others have done.”
- “Would you be open to a follow-up conversation, maybe with one of our legacy planning partners?”

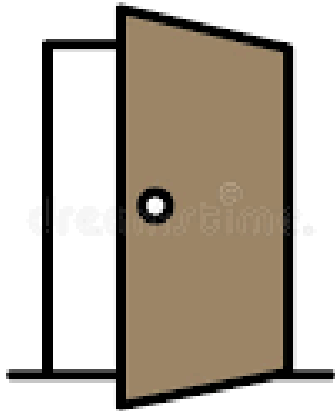


WHEN THE ANSWER IS **NO** (FOR NOW)



- “I appreciate you taking the time to speak with me—I fully understand your current situation.”
- “I’m available to discuss this whenever you feel it’s appropriate.”
- “There’s no urgency at all. Our goal is to provide the opportunity if and when it is meaningful to you.”





KEEP THE DOOR OPEN



Volunteer



Visit



Ambassador



Pre-fund legacy plan



Magic 5 words - **“Would you consider another option?”**



?? Your ideas??



ROLE PLAY TIME



- Participants form triads
 - Solicitor
 - Donor
 - Observer)
- Rotate roles when bell rings
- Observers keep notes:
 - Did the conversation feel clear? Persuasive? Empathetic?





STARTING THE LEGACY CONVERSATION

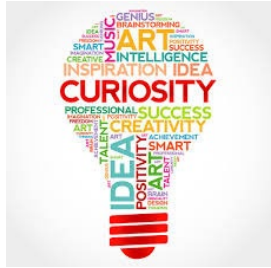
Prompt: Introduce a loyal donor to the concept of your legacy society.

- **Goal:** Establish trust and curiosity (Consider and state what ‘type’ of door they are)
- **Challenge:** Donor may be unfamiliar with legacy giving or assume it's not for them
 - *Observer Focus:* Did the “solicitor” clearly state the purpose and build interest without pressure? Did they offer a warm and empathetic tone?

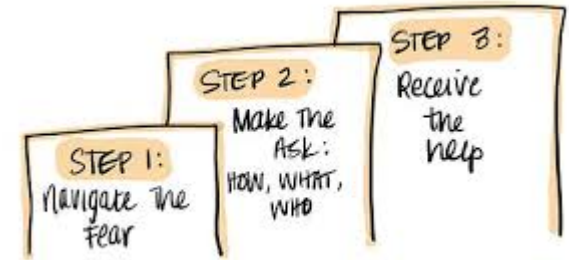


Analytical / Relational / Mission Driven



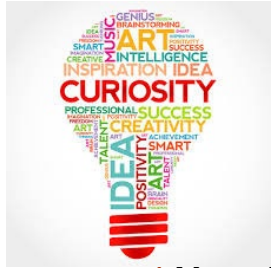


MAKING THE ASK

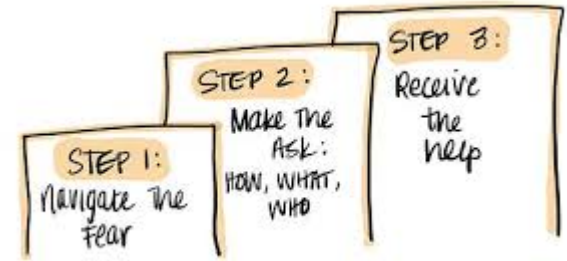


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MAKING THE ASK 2

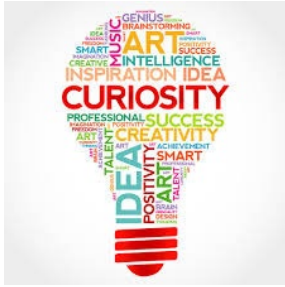


- ✓ You have been a fabulous supporter of _____.
- ✓ We'd love to ensure that your support continues well into the future—even when you're no longer able to give directly.
- ✓ It would be wonderful to talk with you about honoring your lifetime of giving by including _____ in your charitable estate plans. It's simple, meaningful, and makes a lasting impact.

PAUSE

- ✓ The board and my colleagues join me in warmly inviting you to become a Legacy Society Member as part of a community-wide initiative called *Life & Legacy*.





I'M WORRIED ABOUT MY FAMILY

Prompt: Donor expresses concern that a legacy gift might leave their family with less or they might need the money themselves.

- Goal: Offer reassurance, flexibility, and alternatives
- Challenge: Emotional hesitancy, family pressure
- *Observer Focus:* How did the fundraiser demonstrate empathy and offer tailored options?



GROUP DEBRIEF & REFLECTIONS



- What approaches felt most natural?
- How did it feel to speak as a donor?
- What language or tone helped shift the conversation?
- Any “aha” moments?



CLOSING AND COMMITMENT



Legacy giving is
about *people*,
not just *planning*

