##

## Scenario 1:

**You are:**

**LONG TIME BOARD MEMBER AND LOI SIGNER**

You are a long time member of the Board. You have contributed generously and signed a LOI stating you would leave a bequest to the organization. You feel very good about doing so but have yet to formalize your commitment.

**Your job is to:**

1. **“Meet” with the LEGACY TEAM MEMBER.**
2. **Advise them that you have yet to formalize your intent**
3. **Find out how to go about doing so**
4. **Provide a time frame in which you expect to formalize your gift**

****

## Scenario 1

**You are:**

**THE LEGACY TEAM MEMBER**

**You will be speaking with:**

**A Board member who has signed a Letter of Intent:** This long-time member of the Board has contributed generously to your organization for a number of years and has signed a letter of intent stating that their legacy commitment will be in the form of a bequest. S/he feels very good about doing so. You know him/her, but not well.

**Your job is to have a conversation about formalizing her/his intent and providing the necessary documentation for your organization’s records.**

* Thank the donor for their legacy commitment
* Ask a question or two to find out more about why they decide to leave a legacy
* Share the fact that you have formalized your commitment
* Ask if they have had an opportunity to legally formalize their gift
	+ If they say yes – thank them again, share the legacy confirmation form with them and ask to sign
	+ If they say not yet or no – see if you can find out what has held them back and talk them through how to move the process forward
* Make it easy for them to document by showing them the legacy gift confirmation form
* Encourage gently by ending the conversation with a time in which you can follow up

****

## Scenario 2:

**You are:**

**LOYAL DONOR AND LOI SIGNER**

You are a loyal donor, having contributed generously to the organization for more than 10 years. You signed a letter of intent stating that your legacy commitment will be a percentage of your life insurance policy proceeds. While you feel good about making the commitment you are nervous about what your children will say so you are not in a frame of mind to formalize your intent at this time.

**Your job is to:**

1. **“Meet” with the LEGACY TEAM MEMBER.**
2. **Advise them that you have yet to formalize your intent**
3. **Explain to them your reasons for not wanting to formalize at this time**
4. **Let them try to convince you but at the end of the conversation only agree to have them contact you again in 12 months**

##

## Scenario 2:

**You are:**

**THE LEGACY TEAM MEMBER**

**You will be speaking with:**

**A loyal donor who has signed a Letter of Intent:** This loyal donor has contributed generously to your organization for more than 10 years and has signed a letter of intent stating that her/his legacy commitment will be a percentage of their life insurance policy proceeds. S/he feels very good about making the commitment but nervous about what her children will say. You know him/her, but not well.

**Your job is to have a conversation about formalizing her/his intent and providing the necessary documentation for your organization’s records.**

* Thank the donor for their legacy commitment
* Ask a question or two to find out more about why they decide to leave a legacy
* Share the fact that you have formalized your commitment
* Ask if they have had an opportunity to legally formalize their gift
	+ If they say yes – thank them again, share the legacy confirmation form with them and ask to sign
	+ If they say not yet or no – see if you can find out what has held them back and talk them through how to move the process forward
* Make it easy for them to document by showing them the legacy gift confirmation form
* Encourage gently by ending the conversation with a time in which you can follow up

****

## Scenario 3:

**You are:**

**40 YR OLD DONOR AND LOI SIGNER**

You are a 40 year old donor with three young children who has contributed a modest amount to your organization each year for the last five years. You signed a letter of intent at the request of a good friend and agreed that your legacy commitment would be a percentage of your retirement account. You are nervous about having made the commitment because of the multitude of expenses you are facing in the future including paying for day school, Jewish summer camp and college. You feel given these other major expenses that you will need all the money in retirement account to live on and there won’t be anything left for the organization. Because of this you have yet to formalize your intent.

**Your job is to:**

1. **“Meet” with the LEGACY TEAM MEMBER.**
2. **Advise them that you have yet to formalize your intent**
3. **Explain to them your reasons for not wanting to formalize at this time**
4. **See if they can convince you to do so and if so commit to formalizing in 6 months – if not, tell them No you are not prepared to formalize in the near future.**

##

##

## Scenario 3:

**You are:**

**THE LEGACY TEAM MEMBER**

**You will be speaking with:**

**A donor who has signed a Letter of Intent:** This 40 year old donor with young children has contributed a modest amount to your organization for the last five years, signed a letter of intent at the request of a good friend and stated that her/his legacy commitment will be a percentage of his/her retirement account. S/he is nervous about having made the commitment because of the multitude of expenses he/she is facing in the future including paying for three children to attend day school, Jewish summer camp and college.

**Your job is to have a conversation about formalizing her/his intent and providing the necessary documentation for your organization’s records.**

* Thank the donor for their legacy commitment
* Ask a question or two to find out more about why they decide to leave a legacy
* Share the fact that you have formalized your commitment
* Ask if they have had an opportunity to legally formalize their gift
	+ If they say yes – thank them again, share the legacy confirmation form with them and ask to sign
	+ If they say not yet or no – see if you can find out what has held them back and talk them through how to move the process forward
* Make it easy for them to document by showing them the legacy gift confirmation form
* Encourage gently by ending the conversation with a time in which you can follow up