Integrated Ask Scenario 1:

You are:

THE LEGACY TEAM MEMBER

You will be speaking with:

THE NEW BOARD MEMBER. This recently appointed board member has been involved with the organization since her/his twenties. S/he is married with two children in Jewish day school. S/he is a human resource manager at a large corporation. You have known each other for several years through your organization and s/he has made a meaningful gift each year (last year's gift was $1,000) over the last 10 years to the annual campaign.

It is now time to solicit her/him for the annual campaign. S/he is also on the prospect list for your legacy effort. Rather than do two separate asks, you are going to have an integrated conversation – asking her/him to contribute to both campaigns during one conversation.

Your job is to:

1) Call the donor and schedule an in person meeting
2) At the in-person meeting, thank for her/his past support and say something about the impact the annual support has had on the organization.
3) Ask a question to find out why the organization is important to her/him.
4) Ask her/him to increase her/his annual support by 10%.
5) Once you have secured the annual campaign gift, ask if s/he has heard about the legacy program.
6) Depending on the response, transition to the legacy conversation.
7) Invite to join you in leaving a legacy and respond accordingly.

Integrated Ask Scenario 1:

You are:

NEW BOARD MEMBER

You are a new member of the Board having been involved with the organization as a donor since your twenties. You are 40, married with two children in Jewish day school. You are a human resource manager at a large corporation. You have known the Legacy Team Member for several years. You have made a meaningful gift each year (last year $1,000) to the annual campaign for the last ten years.

You are aware that it is time to be solicited for your annual campaign gift. You have some awareness of the legacy program from a report given at the last board meeting, but you don't know the specifics of how the program works.

Your job is to:

1) Meet with the Legacy Team Member
2) Raise objections as they come up. See objections below

Objections to raise:

During the "phone call":

- You are very busy between your work, children and volunteering, not sure you have the time to get together.

During the "visit":

- As a new board member you anticipate that the expectation is for you to increase your annual campaign gift. You are willing to commit to a 10% increase this year after hearing how your previous gifts have impacted the organization.
- You don't currently have a will or estate plan in place and don't know when you will get around to creating one.
- You are paying tuition for two children to go to Jewish day school and are also looking down the road at Jewish camp and college costs. You are not sure what your assets will look like later in life given these expenses.
- You consider your children your legacy and want to leave your money to them.