



## Integrated Ask Scenario 2:

**You are:**

### **THE LEGACY TEAM MEMBER**

**You will be speaking with:**

**A FRIEND OF THE ORGANIZATION, LONG-TIME SUPPORTER.** This long-time supporter has been a modest donor (\$100) for 30 years. He/She believes the organization is very important to the community. He/She is retired. He/She is concerned about having enough money in the future, but continues to make the same annual gift every year. He/She is married, but has no children.

Your job is to:

- 1) Call the donor and schedule an in-person meeting.
- 2) At the in-person meeting, thank for his/her 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 him/her.
- 4) Ask him/her to increase his/her gift by \$20 this year, given that it has remained flat for several years.
- 5) Once you have secured the annual campaign gift ask if he/she has heard of the legacy campaign.
- 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 2:

**You are:**

### **A FRIEND OF THE ORGANIZATION: THE LONG-TIME SUPPORTER**

You have been a very modest donor (\$100), but have given for as long as you have been in the community, about 30 years. You feel this organization is very important, so you give what you can. You are retired and worried about outliving your resources, but not enough to stop giving. You have always given the same amount and are nervous about increasing because you know you will continually be asked to give more. You are married with no children. You are not familiar with the legacy campaign.

**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 not wealthy, so you are not sure why you are being called.

During the first “visit”:

- You are uncomfortable increasing your annual campaign gift, but eventually agree to some increase.
- You are worried about outliving your resources and are not sure you can afford to make a legacy gift.
- This would require that you create an estate plan. You just haven’t put one together—you understand that your estate will pass to your spouse, and you don’t have any kids.