



## Scenario 1

**You are:**

### **THE LEGACY TEAM MEMBER**

**You will be speaking with:**

**THE BOARD MEMBER.** This long-time member of the Board has contributed generously, including to your capital campaign. S/he believes in the organization and has stretched to make his/her commitment—and feels very good about doing so. You know him/her, but not well.

**Your job is to:**

- 1) Get an appointment (a “phone call”)
- 2) Have a conversation about the organization and about legacy giving. Invite him/her to “join you”



## Scenario 1:

You are:

### THE FRIEND OF THE ORGANIZATION: LONG-TIME BOARD MEMBER

You are a long-time member of the Board and a major financial supporter of the organization. You have contributed generously, including to the capital campaign. You believe in the organization and have stretched to make your commitment—and feel very good about doing so. Your support extends to several other Jewish organizations. You have made a capital campaign commitment to another organization as well. But you're not sure you can take on any more major financial commitments. You are a parent and grandparent, and feel that it's important that your grandchildren attend college without financial hardship. You also want your children and grandchildren to carry on your family's philanthropic legacy.

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 wonder if you're going to be asked for money.

During the “visit”:

- You've got commitments to two capital campaigns and feel “tapped out”. You wonder why other donors can't be asked first.
- You have commitments to other organizations.
- You consider your children your legacy and want to leave your money to them so they can give charitably.
- You are also planning to put money aside for your grandchildren's college education. Who knows how much college will cost for them.