



Scenario 2:

You are:

THE LEGACY TEAM MEMBER

You will be speaking with:

THE NEW BOARD MEMBER. This recently appointed board member is a rising star in the organization's leadership, having been involved with the organization since his/her twenties. S/he is married with three children in Jewish day school. S/he is a marketing manager at a large corporation and seems to be climbing the corporate ladder. You have known each other for several years through your organization.

Your job is to:

- 1) Get an appointment (a "phone call") - 2 minutes
- 2) Have a conversation about the organization and about legacy giving – 5 minutes
- 3) Continue the conversation and invite him/her to "join you" in making a legacy commitment– 5 minutes



Scenario 2:

You are:

NEW BOARD MEMBER

You are a new member of the Board and a rising star in the organization's leadership, having been involved with the organization as a volunteer since your twenties. You are 40, married with three children in Jewish day school. You are a marketing manager at a large corporation and are climbing the corporate ladder. You have known the Legacy Team Member for several years through your involvement in the organization.

Your job is to:

- 1) Meet with the Legacy team member
- 2) Raise objections as they come up. See objections below
- 3) Discuss how the role playing went with your partner

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 first "visit":

- You don't currently have a will or estate plan in place and don't know when you will get to do so.
- You are new to the board and while engaged in the organization for several years, would like to know more before you make a financial commitment.
- You are paying tuition for three children to go to Jewish day school and are also looking down the road at Jewish camp and college costs.
- You consider your children your legacy and want to leave your money to them.