



**Scenario 3:**

**You are:**

**LEGACY TEAM MEMBER**

You will be speaking with:

THE 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 and his/her investments took a bit of a hit in the recession. He/She is concerned about having enough money in the future but continues to make a small annual gift every year. He/She is married but has no children.



### Scenario 3:

You are:

#### THE 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 your investments took a bit of a hit in the recession, so you are a little concerned about your situation but not enough to stop your annual gift. You are married with no children.

Your job is to:

- 1) **“Meet”** with the LEGACY TEAM MEMBER.
- 2) **RAISE OBJECTIONS** as they come up. See objections below.
- 3) **Discuss** with your group.

**Objections to raise:**

During the “phone call”:

- You are not wealthy, so you are not sure why you are being called.

During the “visit”:

- These are tough times, and you are not sure you can afford to make a legacy gift.
- These seem like gifts that wealthy people make – you don’t think your gift would make a difference.
- You are on a fixed income – you are not sure you are the right person to make a legacy gift.
- This would require that you create an estate plan. You just haven’t put one together—you knew that your estate would just pass to your spouse, and you don’t have any kids.