



**Scenario 4:**

**You are:**

**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 (\$25) for 10 years. He/She is living off his/her investment income and IRA required minimum distribution. He/She is concerned about outliving his/her resources. He/She is a widower/widow with 2 adult children with families of their own.

**Your job is to:**

Have a conversation about the organization and about legacy giving. Invite him/her to "join you



#### Scenario 4:

You are:

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

You have been a very modest donor (\$25), but have given consistently for the last 10 years. You feel this organization is very important, so you give what you can. You are living off your investment income and IRA required minimum distribution. You are concerned about outliving your financial resources. You are a widower/widow with 2 adult children with families of their own.

Your job is to:

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

During the “visit”:

- You are worried about outliving your financial resources.
- Any gift you leave would be small so it won't make a difference.
- You redid your will about 5 years ago and don't want to pay an attorney to make any additional changes.