



Tips for Legacy Conversations

Call to schedule an appointment:

- **Smile** while dialing the number.
- **Introduce** yourself and your affiliation with the organization.
- Explain you would like to meet to **thank them for their commitment and to share with them all that is happening at your organization.**
- Set up a **time and place** to meet (wherever and whenever is best for them).
- Let them know if **someone else** will be joining you.

At your appointment, strive for the following:

- Body language and eye contact that communicates **attention.**
- Active listening that communicates **respect and caring.**
- Genuine curiosity that demonstrates **interest.**

After thanking them for meeting you and a little chit chat, ask a question:

- When did you make your **first gift** and why?
- Why have you chosen to be a **loyal donor/member**?
- What is the most **meaningful experience** you have had at (organization)?
- What are your **favorite** things about (organization)?
- What is it that we do that you would like to see **continue long into the future**?
- When you think about the (name) Jewish community **40 years from now**, what do you envision?

Focus on the Donor:

- **Listen** to what they are saying.
- Attempt to **understand** their commitment to your organization beyond your “good work.”
- Take **clues from them** to move the conversation forward.
- Look for ways to **acknowledge, affirm and agree** with what they are saying...avoid saying “no” or “but.”

Wait until time is right:

- Whatever you hear – **accept** it and use to navigate through the rest of the conversation.
- **Focus on their connection** to the organization, not what your organization needs.
- If donor presents you with an unanticipated situation (upset at organization for some reason, financial challenges) don't get upset, **work with the information provided.**
- Only ask about a legacy commitment when the donor seems **ready** to hear it.

Share your case statement:

- Your organization's **vision** for the future.
- Why **you** decided to make your legacy gift
- Explain the **incentive grant** opportunity (during the time period when incentive grants are offered)
- Why legacy support is **important**.

Invite them to partner with you:

- **Will you join me in** making a legacy commitment?
- **Be Quiet** – allow them time to respond – silence is not the enemy here.

Be prepared to respond:

- **IT'S ALREADY DONE** – Thank and congratulate. Review the Letter of Intent and ask them to sign. Encourage them to consider including other organizations.
- **YES** – Great! Thank and congratulate. Review the Letter of Intent form and ask them to sign. Encourage them to consider including other organizations.
- **I'LL THINK ABOUT IT** – Ask if there is any additional information you can provide them that would help them with the decision. Set up another time to meet with them, or for a follow-up phone conversation. Try not to end the conversation without a time to reconnect.
- **NO** – ask if they will share their reason. Acknowledge and accept. Depending on the reason, ask if it would be ok to follow up with them in 6 months or next year.

No matter the outcome, always thank your donor

- Send a **handwritten note** after the meeting to again thank them for having a conversation with you.
- If they agreed to have you follow-up with them, make sure you remind them in the note.

After the meeting:

- Jot down notes to remind you of your conversation and to share with your team members
- Report back to your team

Overcoming Objections:

"Given my current financial situation I am unable to make a commitment now."

- A legacy commitment does not require any money now. That's the beauty of it. It's a promise for the future and is paid with after-lifetime assets.

"I would love to make a large gift, but I want to make sure my children are provided for."

- An estate plan that includes your children and other charities you care about can ensure that your children receive an inheritance at the same time as your personal charitable values are honored.

"I am not wealthy. Legacy gifts are for the rich."

- A legacy gift can be made by anyone and be for any amount.

"I don't have any family, so I don't need to think about gift and estate planning."

- State laws will determine the disposition of your estate if you don't have a plan in writing. Even if you don't have a family, you should still create an estate plan that reflects the things you care about.