

National Will Month – why is that important?



Objective

Establishing an endowment plan and ensuring it is incorporated into your organization's culture of giving. 7-steps to get you started and set up for success.



Are you ready??

What is planned giving?



Legacy Giving?



Estate Planning?



After-life time giving?



Charitable Gift Annuities or Trusts



Life insurance?



Retirement plans?

All of them!



Seven questions you can ask yourself to determine your Endowment Readiness



1. Do you have a fundraising plan that has become effective, dependable, routine, organized, and structured?

2. Are your professional and lay leaders aligned in understanding the need for an Endowment?

3. Does your organization have sufficient cash reserves in case of emergency financial needs?

4. Is your investment committee, or board satisfied that you have a transparent, secure investment strategy with excellent oversight?

5. Have you educated your staff and senior lay leadership on the benefits of an Endowment and the language around it?

6. Which volunteer leaders can you recruit to support your efforts?

7. What schedule do you have for general marketing and communication efforts that this plan can be a part of on a regular basis?

7 steps to get you started



CASE
STATEMENT



MANAGEMENT
STRATEGY



TARGET
AUDIENCE AND
PROSPECTS



MARKETING
AND
COMMUNICATI
ONS



SET GOALS



TRACKING AND
REPORTING



STEWARDSHIP

**If you never get started,
you'll never be successful**





Specific

S

Achievable

M

A

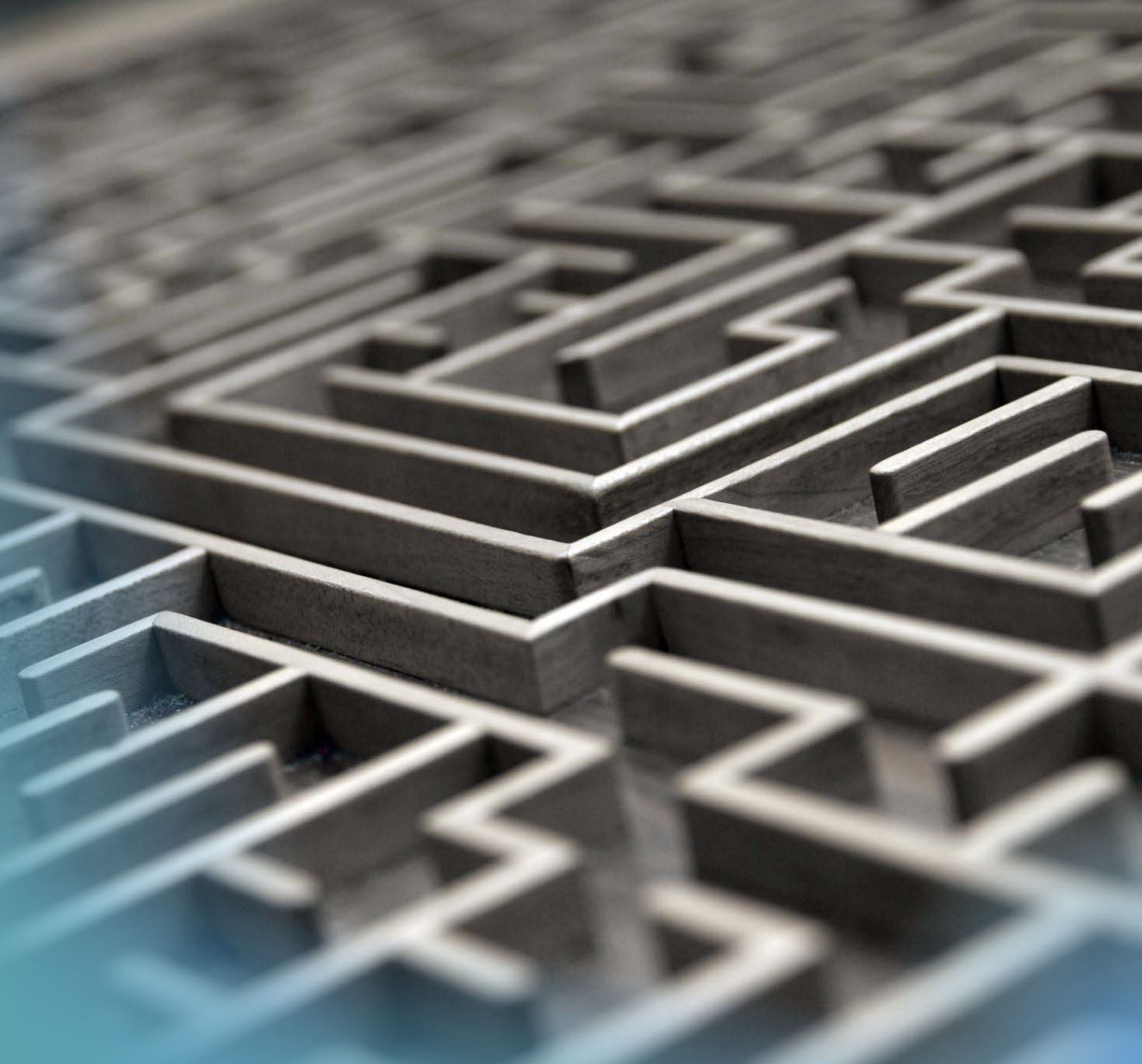
Timely

R

T

Measurable

realistic



Once you have a plan – then what??

- Ways to connect
- Starting the Legacy conversation
- Using stories
- Asking

Connect!

1

Tell me about your history and connection to our organization.

2

In what ways would you like to make a difference?

3

Would you write a statement that we could share with your family about why this organization is important to you?

4

Did you know that we can honor your lifetime of giving by ensuring your legacy will continue for generations?

5

It's tough to know we could be making a choice of giving to the government vs. giving to (org) to save taxes.

6

How would you like to be remembered?

7

Do you need help to formalize and document your intentions?

Where do I begin with a conversation?



1. Reflect

Express Gratitude



2. Connect

Get to know them



3. Tell

Share a story and the vision



4. Share

Aspirations for the future



5. Ask

Humbly request participation



6. Toast

Celebrate and Acknowledge



7. Remember

Stewardship

Tell - What is Your Legacy Story?



"Tell me a fact and I'll learn.

Tell me a truth and I'll believe.

Tell me a story and

it will live in my heart forever."

Humbly request participation

“It’s amazing what you don’t raise when you don’t ask.”



Marcy's 3-Sentence Ask©

Name _____

You have (Why ME?)
(compliment, service, giving)

You understand (Why THIS?)
(special connection to this request)

Would you consider a gift
(legacy commitment) of

(What?) for/to

Then QUIET



FOR A LEGACY:

Jane,

You have been a caring and impactful member of our community for many years.

You understand that our organization/community center is always a place for all people to explore and deepen relationships and build community and connection.

Would you consider committing to creating a legacy to help ensure we can continue to provide this experience for others for many years to come?

Then QUIET



Thank you

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