



“During this part of our conversation about HOW I’ll invite you to discuss issues and details of life events and financial plans that might initially seem very personal to you. Please understand that I want to ensure that any gift plan we create together has your best interests in mind as well as your wishes for our nonprofit, so it will be valuable for me to understand your plans, concerns, and dreams. May I give you several examples of what I mean?”

Break this down in your own voice:

1. Ask permission to discuss very personal things.

2. Explain why you want to do this.

- My goal discussing HOW you might make the gift you want to make is to help you find the best way to make the gift you want to make, for both (organization) and for you.
- I’ll invite you to discuss a number of things and I want you to know my primary purpose is to learn about those things, not to provide you answers or solutions. I may not know all of the answers to your questions because I’m not an expert.
- My purpose in learning about such issues as planned life events, asset allocation, and tax concerns is to identify possible giving strategies that might complement your plans.
- When it comes to the answers and solutions I can call on experts, and we should also include your own experts, in exploring any gift potential from what you and I discover together.

3. Offer selected examples to prime the pump.

- You might be thinking of selling a vacation home and investing the proceeds for retirement
- You might be meeting with your attorney to update your estate plan
- Someone you love might need long-term care and you’re thinking of selling some appreciated asset to pay for it
- You may be anticipating a windfall, maybe a big income event or an inheritance
- You may be planning for business succession and retirement
- You might be thinking of creating a donor advised fund or a family foundation
- You may be wondering what to do about the required distributions from your deferred compensation plan
- You might tell me you’re starting an annual gifting program for a new grandchild
- You might tell me you recently met with your CPA who advised you to start reducing the size of your taxable estate
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Scarlett Rose

- Age 77, retired office manager
- Widowed three years ago, one grown son
- Annual donor @ \$500 for each of the past eight years; has given for 22 consecutive years; \$10,100 lifetime. All gifts have been unrestricted.
- She gave \$5,000 to your recently completed capital campaign; it came in response to the campaign-end mail appeal and was a surprise
- You met Scarlett at the dedication event for the new building several weeks ago, when you requested this meeting. She asked about a gift in memory of her late husband Thorne.
- Research identified only Scarlett's home as a giftable asset; valued at \$335,000
- \$50,000 gift capacity



A THREE PART APPROACH TO INTRODUCING A GIFT PLAN TO A PROSPECTIVE DONOR

Like every other step in helping your new donor design a gift plan that will benefit both your nonprofit and your donor, you want to focus on language that is intellectually accessible and emotionally appealing to your donor, especially once you identify a gift strategy you believe will resonate and that will accomplish your goals.

A too-early transition from a conversational approach to legal/technical language is generally counter-productive to your goal. Consider these three steps when you're ready to introduce your gift idea.

1. ANNOUNCE Your Agenda (Emotionally Appealing)

"I want to talk with you about a gift plan that provides you several benefits." (Name them; get your donor's attention.)

- Benefit to Donor
- Benefit to Donor
- etc
- "AND it allows you to make the gift we have been discussing"

Ask – "May I explain how this works?"

2. DESCRIBE how the gift plan works (Intellectually Accessible)

Now you can explain, still using conversational language, how the plan works. You will want to practice describing the components of a life income gift, a gift by will, a beneficiary plan for identified assets, a gift of appreciated real estate. Stay focused on how it benefits the donor.

Resist the inclination to name the gift plan too soon. Once you say, "Let me tell you how a charitable gift annuity works," you are at risk of the donor honing in on the word "annuity" and drawing conclusions before you have the chance to explain how this gift strategy works.

Put printed materials in front of your donor only once you have responded to initial questions. Now you can reiterate your key points while pointing to pertinent parts of your printed materials. You will also create a more positive emotional climate if your donor wants to invite others to participate.

3. INVITE questions & discussion

Once you have gotten your donor's attention s/he will be far more receptive to learning the details. You can use this discussion to help you design the specific illustration you want to share, or make notes to change any initial illustration you brought to this meeting, tailoring it to your donor's specific interests.

It isn't necessary that you introduce each topic in sequence. But once you know what these three topics are you increase your chances of addressing each during the gift conversation.