SAMPLE SCRIPT FOR LEGACY CONVERSATION

Telephone or In-Person Conversation
(In-Person is always preferred)

Hello,

This is [name].

I am calling on behalf of [name of organization].

We would like to thank you for your loyal support to [name of organization].

Did you know that we have a legacy society, the [name of legacy society]? [Briefly tell donor what your legacy society is, i.e., a donor recognition wall, and why you have it]. I was wondering if we could meet for lunch or coffee to tell you more about it and hear your thoughts. [Set up meeting with donor].

Meet with Donor (or on telephone if cannot obtain in person meeting)

Thank you for taking the time to meet with me. [Name of organization] greatly appreciates your support and commitment. [Ask how the donor is doing; discuss donor’s involvement with the organization].

You have devoted your time and given generously over the years. Have you considered what your legacy will be?

Why do you support [name of organization]? Have you thought about how you might continue that support for future generations?

We are trying to strengthen [name of organization] for the future through our endowment fund at the Jewish Community Foundation. Have you (or would you) considered helping with a legacy gift?

Alternative: I felt that it was important to include [name of organization] in my estate plan because [tell donor why you have made a legacy gift]. Would you consider joining me?


There are so many ways to give. A simple bequest in your will or trust, leaving a percentage of a retirement account, or income producing vehicles, such as a charitable gift annuity, are just some examples.

[If the donor is interested in a particular program or area of interest at your organization] Legacy gifts can be flexible to meet your goals and can provide support to a specific program here, such as [name of program the donor is interested in], or be unrestricted so that [name of organization] can best meet its needs in the future.

We have a wonderful relationship with the Jewish Community Foundation. I’m happy to have their Charitable Planning Officer, Elise Wald, who is a former estate planning attorney, get in touch with you to have a confidential discussion about giving options that may meet your needs.

[With permission, connect Elise and the donor. Or suggest a meeting with all parties.]

Thank you very much for your time. I appreciate your thoughts and input. [I will have Elise get in touch with you.]

Overcoming Objections:

- We recognize that things may change over time and your commitment now is in no way absolutely binding. Would you like more information on the ways to leave a legacy gift?

- We understand that you may not be able to commit to leaving a legacy now. I am still interested in hearing your thoughts about our endowment and our legacy society. How do you think we’re doing? Where do you see room for improvement?

Notes:

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Talking Points:

- Jewish tradition states that one of our key duties is to make the world a better place for future generations. Your legacy gift will do exactly that.

- Planning a future legacy gift allows you to provide for the organizations that are close to your heart – to make sure that your support will continue after your lifetime.

- Your legacy gift will be added to [organization name]’s endowment, which allows us to receive a payout each year towards our operations and programming, without ever losing the principal.

- This is the same approach that hospitals and universities have used for many years, to build the financial strength of their institutions.