world premiere

with Tom Ahern

2013 LEADERSHIP SUMMIT

the foraker group
Standing Beside Alaska's Nonprofits
Selling bequests!
The delicate art of asking for that final gift
Essential point #1

“Bequests are life-driven, death activated....”

Source: Richard Radcliffe
Who is Richard Radcliffe?

- World’s leading authority on bequest giving
- Raised by his butler
- Comfortable around wealth: his family owned 3 castles; now down to their last half-castle
- Richard has personally interviewed more than 17K donors about WHY they give
- He’s exhausted
- Best question: “Why did you make that first gift?”
- If my org. wanted a hugely successful bequest program and had $20K for a fee, I’d give Richard the job (it’s a bargain; you’ll make it back 100 times over)
Essential point #2

You already know your best prospects...
Essential point #3

Middle-class widows rule...
Sure, I made a charitable bequest ... to the university where I met my husband, where I graduated, and where all six of my kids graduated.
Who gets the gift, if you don’t ask?
Pets & nurses
What we know
Thought for today...

“...dead people, through their estates, give away more money year after year than all U.S. corporations combined.”

Source: How to Raise $500 to $5,000 from Almost Anyone, Andy Robinson
‘Drip, drip, drip. Planned gifts are prompted by life events – death, birth, marriage, health, travel, retirement. That’s why it’s so important to have a regular cadence of marketing messages. Because you never know when the time might be right.’

Source: 2012, Jeff Comfort, Georgetown; via Phyllis Freedman’s Planned Giving blog
People make wills at 3 times

- 38 - Have kids or acquire assets
- 68 - Retirement
- 80 - Get their affairs in order

Source: Richard Radcliffe and others
A simple plan

• An annual letter to your loyal donors
• Offer a free “bequest information” sheet
• Little stories of “Why I decided to make a bequest” in your newsletter
• An annual meeting of your bequest society
• Sample bequest language on your website
Why my father left a legacy

"My father was sent to Palestine and the Far East during the Second World War and saw first-hand the hardships faced by children in the developing world. He also saw what a big difference just a small amount of money can make.

"He also had a deep commitment to the work of UNICEF and decided to leave a gift in his Will to help children – and in memory of his wife Betty, who shared his support for the organisation’s wonderful work.

"We were all saddened when my father passed away in January 2007. But his support for UNICEF lives on in our family, right down to his great-grandchildren. So it is heart-warming to know what a difference his legacy is making to children. I am certain he would urge others to support UNICEF, as he and my stepmother did."

Louise Hopkins, daughter of UNICEF supporter William Tait

Source: Richard Radcliffe
# Calendar for bequest mktg. to donors

| Year-round | Monthly e-mailed news w/ bequest reminder |
| 1st Quarter | Annual bequest reminder letter  
           | Item in print donor newsletter |
| 2nd Quarter | Annual legacy society meeting  
            | Spring solicitation w/ bequest reminder  
            | Item in print donor newsletter |
| 3rd Quarter | Fall solicitation w/ bequest lift note  
             | Item in print donor newsletter |
| 4th Quarter | Item in print donor newsletter |
A simple annual letter – 1 page

• Thank them for their generous, wonderful, kind, continuing support over the years
• Ask them simply to consider adding a charitable bequest to their Will: “Ensure our future!”
• Offer free easy-to-understand information
• Invite them to join your legacy society
• Thank them again for their help and consideration
There are nine adjectives Americans use to describe a moral person: kind, caring, compassionate, helpful, friendly, fair, hard-working, generous and honest.

• Each generation uses different language – older females like cosy language whilst men like it more upfront.

• Younger generations like more dynamic language.

• Words change their meanings over years! Match the language for the generation and gender at events to maximise the experience

Source: Richard Radcliffe
What we can learn from a 4-page letter ... and why you probably shouldn’t write one
“Gather ye rosebuds while ye may
Old time is still a-flying…”

Robert Herrick 1591-1674

Dear Friend,

I still remember the dreadful chill that spread over me when my wife Leslie came out and said “It’s cancer.”

A routine mammogram found an “irregularity”.

At first we weren’t too worried. She’d had unusual lumps before.

Then we got the results of the biopsy — an 18mm tumour in a milk duct, quite advanced.

I felt like I’d been shot.

Within a week Leslie was in hospital having the lump removed.

My grandmother died of cancer — slowly and painfully — long before I was born.

My mother was only 11, but she remembered vividly the terrible pain and carried the fear of it all her life.

And my wife’s brother died of cancer at 11. Three years earlier he’d complained of a splintered rib that wouldn’t heal.

He went into hospital to have it treated. They found he had bone cancer. He had surgery to remove it, but it had already spread, undetected, to his skull.

So you can see why Leslie’s diagnosis of cancer hit us so hard.

It was utterly chilling.

It changed the way I see the world.

Things that seemed important before, like renovating the house,

over please...
I still remember the dreadful chill that spread over me when my wife Leslie came out and said, “It’s cancer.”
suddenly became less significant.

Life and relationships were far more important.

We don’t necessarily do things a lot differently. We both still work. But we find we look at life differently.

We take the time to “gather ye rosebuds while ye may . . .” As the poet Robert Herrick put it, we take the time to enjoy the things we have, right now, because time is passing and we don’t know when we might not be able to.

It looks like Terry will be fine. The lump was removed. She’s had radiotherapy and it seems as if she’ll be alright.

But I’m sure you’ll understand from this story why I am especially honoured to be an ambassador for Cancer Council.

As a supporter of Cancer Council, I am writing to you to ask you to consider something very important and that you might find quite personal.

It’s this: have you made a will? And if you have, is it up-to-date?

Around half of all Australians are intestate (so it’s not a new disease – it just means you have no will).

If you die without a will – as sometimes happens, particularly in the case of car accidents, or heart attacks – it can take months or years to work out the legal issues involved, sometimes leaving those who depend on you with inadequate or no support.

In some cases, where there is no close family and it’s not clear who inherits the estate, it all just goes to the government.

To make it easy for you, Cancer Council has produced a helpful, free booklet about making your will.

You’ll find in it a free will form – something like the kind of will form you can buy in most newsagents, only free – and a Codicil form, that you can, if you wish, use to make simple changes to your will.

If you’d rather see a solicitor about your will, the booklet contains a whole list of useful questions to ask them.

There’s also a list of things to prepare, so that when you do see your solicitor, you’ll be well informed about what to ask for.

I’m sure the booklet will save you time and help you get everything you need from your solicitor.

next please...

I’ve also enclosed a bookmark for you.

It’s a tiny sample of the type of material you get in the booklet. Although you’ll find the booklet goes into much more detail.

I want to be straight with you though – the booklet also asks you to consider whether you might leave a bequest to Cancer Council.

You don’t have to leave a bequest. Indeed there’s absolutely no obligation for you to do so if you ask for the booklet.

But it’s really worth thinking about.

There is so much that can be done to beat cancer.

For example Cancer Council are currently funding three research projects into pancreatic cancer, which remains almost as deadly today as it was 50 years ago.

Cancer of the pancreas has a 90% death rate and can kill within weeks of diagnosis. Cancer Council is determined to beat pancreatic cancer.

And they are very hopeful that long-term funding of research will provide new clues and answers that will eventually turn into effective treatments that may lessen the impact of this dreadful form of cancer.

As well, Cancer Council provides support to cancer patients, information to families and patients, and education about cancer and cancer prevention.

It also provides helplines for people having cancer treatments, which are often used by country people who have to go to Sydney as a major centre for treatment.

The statistics tell us that roughly one in two Australians will get cancer at some time in their lives.

Just in my own family, I can see evidence of that.

We’ve been lucky really, that is hasn’t touched any of us younger.

A few years ago I got a letter from a lady whose niece was in hospital with cancer. Her niece loved Blue Healesers, so I volunteered to visit her to take her a T-shirt.

I’ll never forget this girl. There was nothing left of her. I was so glad to do something for her, however small.

She died a couple of days after I saw her, and I can only hope I gave her a few moments of pleasure.

Thinking of her, my heart goes out to all those families who have a child or another family member who has cancer.
So please consider the free information about Will making and bequests that Cancer Council has prepared for you. You can read for it today using the Anupamto form I have enclosed.

If you do choose to include Cancer Council in your Will,

I’d like to invite you to join a very special group called the Daffodil Circle.

It’s a group of those who have generously decided to leave a bequest to Cancer Council to help beat cancer.

As a member you’ll get special invitations to select events a couple of times a year. You will hear about recent research developments, and you’ll get to meet other people like you, who are also supporting Cancer Council in this way.

If you send for the booklet, there’s no obligation to make a bequest to Cancer Council. Any enquiry you make will be kept completely confidential.

And remember, you don’t have to be rich to leave a bequest. You can choose to leave a specific amount, a percentage, or even the leftover after all your family and loved ones have been taken care of (known as the residual).

It will all make a difference.

Whenever you do, please make sure you have a Will and that you provide for those you love.

And use the bookmark I have enclosed, or, if you wish, give it to a friend so they can send for the free booklet themselves.

And when you do sit down to make your Will, take a moment to think of those you love; and make sure you “gather ye rosebuds while ye may”.

Please consider Cancer Council in your Will. You never know who it might help.

Yours sincerely

John Wood
Ambassador
Cancer Council NSW.

If you do decide to leave something to Cancer Council in your Will, please accept my invitation to join the Daffodil Circle. I’d be delighted to meet you at one of the events. And send for the free Will form and booklet today. Even if you already have a Will, you can use it to double check you’ve asked your solicitor all the right questions.
All the underlines in this letter...

- It looks like Leslie will be fine.
- Around half of all Australians are intestate
- free Will form [in the brochure the letter offers]
- Codicil form
- help you get everything you need from our solicitor
- effective treatments that may lessen the impact of this dreadful form of cancer [he's talking about research into pancreatic cancer, thanks to Council funding]
- support to cancer patients
- hostels for people having cancer treatment
- join a very special group called the Daffodil Circle
- special invitations
- And remember, you don't have to be rich to leave a bequest.
- Whatever you do, please make sure you have a Will and that you provide for those you love.
Other cool stuff about this letter...

• **Highly skimmable.** The first 9 paragraphs are either one or two-lines deep.
• **Unblushingly intimate.** Tells story of his wife’s cancer scare.
• The word Will is always **capitalized**, elevating it.
• **Offers** “a helpful free booklet about making your Will.”
• **Includes a charming PS.** This famous actor says, “I’d be delighted to meet you at one of the events.”
• **Includes a reply form.** Forms offer three check boxes: (1) I am considering including a gift to Cancer Council in my Will. Please send me a copy of your booklet, 'Imagine a future without cancer.' (2) I have already included Cancer Council in my Will. (3) I plan to include Cancer Council in my Will.
7 questions to consider in your Will

1. Who do you want to be your Executor? (The person who handles your affairs)

2. Who will be the guardian of your children under 18?

3. What businesses or assets do you have, and what do you want to happen to them?

4. What gifts or bequests do you wish to make to charities or good causes?

5. Do you have debts owing to you that you want forgiven or waived?

6. What are your preferred funeral and burial arrangements?

7. Do you want to be an organ donor?

For your free copy of “You never know who it might help. Your Guide to Wills and Bequests”, including free Will and Codicil forms please fill in the coupon below and post to,
The Cancer Council NSW PO Box 572, Kings Cross NSW 1340
Ph 02 9334 1943 Fax 02 9357 2676

☐ Yes, please send me The Council’s booklet on Wills & Bequests

Ms/Mrs/Miss/Mr/Dr
First name ____________________________
Last name ____________________________
Address ______________________________
Tel ____________________ PC ______

© Tom Ahern | © 2013
Messages and messengers

• Give them the information to act immediately (committed donors)
• Make them aware of the outcomes of legacies (older people)
• To give them a vision so they know the effect of their legacy (younger people)
• Ask them to promote legacies (volunteers)
• To meet the best prospects (committed donors)
• To inform them that a legacy costs nothing now (lapsed donors)
• To inform them of the tax benefits of a legacy (wealthy)
• Are professional advisers important – not as much as you might think!
• But great to give Will-related stories in your newsletters

Source: Richard Radcliffe, 2013
Richard Radcliffe calls his workshop Journey’s End
Who gives?
First, there is no correlation between either income or wealth with the likelihood of giving by bequest.

Second, that the average bequest, now about $35,000 in the US, typically comes from the estate of a retired woman who either has no living children, or feels they’ve got enough money of their own.

Source: Mal Warwick, quoting Robert F. Sharpe, Jr.
3 major vectors:
(1) high LTV donors
(2) childless
(3) no grandkids
“If your definition of a major gift begins at $20K, our estate will likely equal at least 50 major gifts.”
• The largest gift most people make is a legacy gift

Most bequests are left by middle-class women.

Data source: Richard Radcliffe
• Legacy donors make larger annual gifts than non-legacy donors

You already know the people who will give you bequests.

Source: Caleb B. Rick, Legacy Giving
Likelihood of bequest, by type of donor

As LTV rises, likelihood of a bequest rises ...

Source: Pareto [RG = Regular Giver, i.e., monthly donor]
Bequests are “major gifts for the rest of us.”
Legacy marketing ... is about getting a small number of very large gifts from your ‘average’ donors. These are the donors who aren’t on your radar screen already, who aren’t interested in tea and banana bread with a planned giving officer, but who are very loyal to your cause.
Bequest marketing best fits in with annual giving ... not with planned giving and major gifts.
“What we have here is a failure to communicate.”
The need for legacy gifts needs to be clear.... This means our organization needs a compelling, passionate, relevant, ambitious, realistic future vision.

David Love
Among Canadian direct mail donors, research shows...

- 92% have a will
- 97% know they can leave a charitable bequest
- 48% think that charitable bequests are ‘a good idea’
- 17% have already made charitable bequests – and,
- A further 18% are considering making this kind of gift.

The majority have never been asked to make a bequest.
Dear Supporter,

I'd like to share some thoughts with you. I am sure you are aware that the RNLI is funded totally by voluntary contributions and that legacies are our largest source of income. We are concerned about future legacy income and it seems sensible to talk about our concerns with our regular RNLI supporters as early, and with as much candour, as possible.

Source: Royal National Lifeboat Institution
“A legacy is not a donation. It’s an investment.”

Source: Richard Radcliffe
Our Promise
Shaping Students Who Shape the World

Imagine...
  a painter who makes the bolder stroke and doesn’t look back.
Imagine...
  a CEO who factors family into the bottom line.
Imagine...
  a college student who speaks the truth with diplomacy and tact.
Imagine...
  a surgeon who holds your hand while you weep.
Imagine...
  a parent who helps you remember what a good job you did.
Imagine...
  a teacher who shows you just how dazzling life can be.

This is what it means to be a Santa Catalina Cougar when you’re all grown up. These are our graduates. These will be your children; people who have the mind to know what is right, the heart to do what is right, and the skill to do it well. This is our family.

When you join the Santa Catalina family, you commit to a life that has meaning and purpose. For us, this begins by recognizing that our lives and accomplishments have true value only in relation to others. It calls us to use our gifts to leave the world a better place, to be a strength and comfort to all we meet, and to share in the satisfaction of the hard-won goal. Our emphasis on community runs contrary to the individualism of modern culture, and it is the reason we say Santa Catalina offers an education that prepares students for life beyond school. It is the reason we say our students will help shape the world—one moment at a time.

Our method is simple. We take the finest students, and we pair them with the most talented teachers. We equip our teachers with the best training available, and we give them their primary charge: know each of your students, and know each one well. When students graduate, they know their worth, they know how to help others, and they know they are loved. This is the Santa Catalina way.
Leaving a Bequest
Frequently Asked Questions

Why should I leave a bequest to UNICEF?

What is UNICEF’s ABN and address?

How do I include UNICEF in my Will?

How do I amend my existing Will?

Should I tell you that I have included UNICEF in my Will?

Other questions [links to general FAQs about the organization]
Why this workshop isn’t called “how to market planned giving”
90+

= % of average American donors who say they’d be happy to consider adding charity to their wills

fewer than 10

= % of these same donors who’d already done it

Source: Iceberg Philanthropy
#1 reason donors do not add charity to their wills?

“It never occurred to me.”

Source: Iceberg Philanthropy
The biggest obstacle to giving is this:

People don't know you need their help.
All fundraising copy should sound like someone talking.

-- George Smith, Tiny Essentials of Writing for Fundraising
<table>
<thead>
<tr>
<th><strong>BSA Charitable Gift Annuity</strong></th>
<th><strong>Donor's Income Tax Deduction</strong></th>
<th><strong>Income Beneficiary</strong></th>
<th><strong>Income Payment</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Difference between the fair market value of the initial gift amount and the actuarial value of the non-charitable income obligation.</td>
<td>One or two individuals named in the agreement.</td>
<td>Based on actuarial tables. Rates increase with age.</td>
</tr>
<tr>
<td><strong>BSA Pooled Income Fund</strong></td>
<td></td>
<td></td>
<td>Pro-rata share of pooled fund's income. Paid quarterly.</td>
</tr>
<tr>
<td><strong>Charitable Remainder Annuity Trust</strong></td>
<td>Present value of charitable remainder calculated with government mortality tables and earnings assumptions.</td>
<td>Donor and/or others named in the trust agreement.</td>
<td>At least five percent of initial fair market value. Paid at least annually.</td>
</tr>
<tr>
<td><strong>Charitable Remainder Unitrust</strong></td>
<td></td>
<td></td>
<td>At least five percent of net fair market value, revalued annually and paid at least annually.</td>
</tr>
</tbody>
</table>
“Planned giving.”

“Bequests.”
Everyday talk. Good.
“Some say bequests constitute at least 80% of so-called planned gifts; others say 90% or more…”

Source: Mal Warwick, March 2004
80-90% of all “planned gifts” are bequests. Why is it an also-ran?
Maybe *another* reason it never occurred to them?

“I had no idea what you were talking about.”
“Life driven, death activated.”

Lord Richard Radcliffe
LAUREATE SOCIETY

Be remembered for your passion
Here are a couple of good reasons why.

Reason #1: A permanently endowed fund is forever.

How forever is forever, you might reasonably ask? In England, there are college endowments that go back five centuries.

Here, in our newly-formed country, in 1790, Benjamin Franklin endowed, through a bequest, a fund to benefit the people of Philadelphia and Pennsylvania. That fund fulfilled his wishes for more than two centuries.

The Community Foundation for Greater New Haven itself began with a bequest in 1928 from Nettie J. Dayton. From that day to this, we’ve never spent a penny of her principal. That’s “forever” as we know it.

When you leave a charitable gift in your will to permanently endow a fund, you are guaranteed that:

- your fund will exist in perpetuity;
- your fund will make gifts annually to charity;
- your fund, on average, will grow every year.

Which, in our view, is as “forever” as a reasonable person can predict.

Reason #2: You can protect your heirs — and still give to charity.

Some people in their wills specify a certain dollar amount: say a $100,000 charitable bequest to set up a named endowment at The Foundation. Some specify a percentage of an entire estate: say, 5% or 10% of whatever the estate amounts to, after all the appraisals.

Some leave a valuable asset like a painting or stock, in lieu of cash. And others put family first and give whatever is left, after all other gifts are distributed. This is called a “residuary bequest.”

There are many ways to go. And we’ll be delighted to help you examine the options. See the last page of this booklet for contact information. The Community Foundation for Greater New Haven is always ready to answer your questions.
Meet

Tim Bostic and Tony London, members since 2007 of the Legacy Society for Hampton Roads

Type of charitable bequest
The bulk of Tim Bostic and Tony London’s estate will go to the Hampton Roads Community Foundation to create a charitable fund. Proceeds from their fund will be divided half for scholarships and half for grants to organizations that help families in need.

“We had intended to create our own foundation and have it managed. But our attorney said it would cost too much.”

Tim and Tony were drawn to the Foundation, they say, because of our low administrative costs, our high rank among community foundations nationally, and because they could choose how their funds would be used.

A bit of background
Tim Bostic and Tony London are big supporters of children’s charities. Tim is a Ph.D. who “saw heartbreaking things” as a former high school teacher, spurring his interest in scholarships. He is now a research assistant at Old Dominion University. Tony is a Realtor who specializes in working with older homeowners. They’ve been a couple for more than 20 years and live in Norfolk.
How does it work?
It’s pretty simple,
once you decide to save the world…
Or your local library.

Frequently Asked Questions

Q: Why should I make my bequest through The Rhode Island Foundation? Why not leave a gift directly to a charity?
A: The Rhode Island Foundation is a permanent institution, founded in 1915. Decades from now, or even centuries from now for that matter, The Rhode Island Foundation will still be here. And your bequest will still be hard at work, making grants to the charities and causes you care about most.

Q: Is it difficult to make a charitable bequest?
A: Not at all. You can do it today, with a call to your lawyer, if you already have a will. Or call the Bequest Department at The Rhode Island Foundation (401-274-4564). We’ll answer your questions. We can suggest language for your will or trust. We can even help you find an attorney, if you need one.

Q: How big is a typical charitable bequest in Rhode Island?
A: Individual bequests to The Rhode Island Foundation over the past 10 years have ranged from $10,000 to many millions.
Crafting Your Personal & Financial Legacy:
Preparing Your Estate Plan

Preparing your estate plan can be a difficult process and is typically a time of deep reflection as you seek to craft both your personal and financial legacy. You will most likely ask yourself questions such as:

Which people and what events held the most meaning for me?

What values have I lived by and which do I want to be remembered for?

Where are all my important personal and financial documents?

What people or organizations do I want to benefit from my estate?

This four-part document is made available to assist you as you consider these questions. Completing all or any section is optional.

Foxdale Village is a 501(c)(3) and is registered with the state of Pennsylvania. The official registration and financial information of Foxdale Village may be obtained from the PA Dept. of State by calling toll free within PA, 1-800-732-0999. Registration does not imply endorsement.
Your Estate Plan

Part I: Crafting a Personal Legacy
introduces a document some call an ethical will and others a spiritual biography. Such a
document can help you communicate about life events, people, and values that shaped
your life.

Part II: Your Personal Financial Inventory
is not meant to replace talking
with family and legal advisers. Rather, the
document will help you assist them with
locating important people, documents, and
other property after you pass.

Part III: Your Legacy to the Broader World
provides information to those who may wish
to benefit their church, synagogue, university,
or another nonprofit organization with a
legacy gift. Information is provided regarding
ways you can make a gift today that will have
benefit far beyond your lifetime.

Part IV: After Death:
Estate Administration Checklist
lists steps that the individual or individuals
responsible for managing your estate will
need to take in the first year. This list is one tool
that you can use to smooth the transition
of personal values, belongings, and assets
to your heirs.

You can begin developing estate planning documents at any time and once you do so are
encouraged to revisit them at least once a year. Ensuring that these documents are in order
will aid your family and friends as they cope with loss and seek to fulfill the wishes you have
outlined in your estate plans.

The Planning Process ~
When and with Whom to Share Documents

• You can begin developing estate planning documents at any time.
  It is recommended that you confer with legal and financial advisors and also speak with
  individuals such as family members, friends, clergy, and others who may play a role in
  carrying out your estate plans or should be aware of your plans.

• You can decide with whom, where, when, and how to share this information.
  Options include a birthday or anniversary, during holidays, or at a special family meeting.
  You may wish to share information about your values and why you made the decisions
  you have made regarding the distribution of your state.

• You may wish to revisit these documents on an annual basis.
  A review may be triggered by changes in state or federal estate tax laws or life changes
  such as: the sale of or desire to sell a property (real estate, stock, a collection, etc.), the
  death of the spouse, a divorce, or another transition in your life or that of individuals who
  are being remembered in your estate plans.
“Humans are driven by a will to establish meaning in their lives. They need purpose.”

That’s your real job, in donor communications: to bestow purpose in exchange for support.

Source: Psychologist Viktor Frankl, via the For Impact blog
How do you start a miracle growing?
You plant a gift in your will.

"Medical miracles" in children's health care ... 
... those breathtaking advances that, when you first hear of 
them, seem almost impossible to believe ... 
... can often be traced back to just two things:

1. an idea in the right mind; and ...

2. enough philanthropic investment to transform that wonderful 
idea into a healing reality.
“Leave a legacy” is not just a bunch of words.

It’s about perpetuating personal values and beliefs and a desire to matter.
70-somethings are urgently interested in just two things:

(1) exerting as much control over their lives personal environment as possible ...

and (2) "discovering their legacy." I.e., "What has my life meant?"

Source: How to Say it to Seniors, David Solie
Question asked by ALL legacy prospects “WHY should I give a legacy and what will it achieve?”

Without a clear legacy vision you will not give yourself the best chance to succeed

Without a vision there is little to grab hold of to enable a great donor experience

Source: Richard Radcliffe
...in the UK [charities] have created inspiring “legacy information kits” not for donors, but for volunteers!

David Love
...proudly trumpet significant “family” commitment from folks like our past and current board, past and current staff, past and current volunteers....

David Love
We are in contact with our pledgers. We share their dreams. We share our results. We invite them to tell us their stories.

David Love
We identify and eliminate all barriers to saying “YES” and all the reasons for saying “NO”.

David Love

agents of good
More men are guilty of intestacy than adultery.

major barrier
Make a Will Week

17th – 21st September 2012

Protect your loved ones by making or updating your will
Will Week | April 22 - 26, 2013

PERFORM A NOT-SO-RANDOM ACT OF KINDNESS

Make sure your wishes for the future of your family and your community are met.

Attend a free estate planning seminar and learn about how to create a Will, update your existing Will, or make charitable gifts within your Will. Seminars are free on a first come, first served basis. Seating is limited. Please register in advance by calling 204-944-3394 or by emailing publicrelations@winnipeg.ca.

MONDAY, APRIL 22
9:00-9:30
Charlevoix Senior Centre, 1279 Robinson Boulevard (very limited seating)

10:00-10:30
Seven Oaks General Hospital, Wellness Institute, Room 4, 1005 Leila Ave. (very limited seating)

11:00-11:30
Waverley Heights Community Centre, 1175 Chancellor Drive

TUESDAY, APRIL 23
9:00-9:30
ACCESS Downtown, Room 200, 640 Main Street (very limited seating)

10:00-10:30
River Heights Community Centre, 3110 Grosvenor Avenue

11:00-11:30
Maples Community Centre, 414 Adlard Drive

Salle S et B - Centre de services bilingues de Saint-Boniface
614, rue Des Autres "Ce séminaire est en français seulement"

WEDNESDAY, APRIL 24
9:00-9:30
Salon A - Richardson Conference Centre
Richardson Concourse Level – One Lombard Place

10:00-10:30
St. George’s Anglican Church, 1616 Wilson Street (Wilton at Grosvenor)

11:00-11:30
Fort Garry United Church, 800 Portage Avenue

12:00-12:30
Crestwood Community Centre, 1270 Corydon Avenue

THURSDAY, APRIL 25
9:00-9:30
ACCESS Transcona, 845 Regent Avenue West (very limited seating)

10:00-10:30
Legal Help Centre, 31, Balmoral Street (very limited seating) (Colony Square, across from the U of W on the south side of Portage Ave.)

11:00-11:30
Southdale Community Centre, Multi Purpose Room, 354 Lisieux Road

12:00-12:30
Bramford Park Community Centre, Creative Arts Room, 7321 Henderson Hwy

FRIDAY, APRIL 26
9:00-9:30
BDC Building, 335 Carlton Street, Lower Level, Meeting Room B

10:00-10:30
Manitoba Hydro Place, 360 Portage Avenue (meet at the Security Desk)

11:00-11:30
Deer Lodge Centre – Life and Learning Centre, 2nd Fl., 409 Portage Ave.

The Winnipeg Foundation is proud to be a partner in Will Week.
During bad economic times, bequests can be especially attractive to avid supporters on reduced incomes…
Can’t afford a gift to your favorite charity this year? Make a charitable bequest instead.
There is a core group “of mostly retired donors who although cash poor (and thus they belong to the lowest income category) are actually asset rich.” They are an important market for bequests.

Source: James and Sharpe, via Adrian Sargeant, 2009
“What psychologists refer to as ‘self-grieving’ or grieving for the loss of oneself is common with the elderly as they begin to experience a number of physical difficulties and limitations. (Shaffer 1970). It is interesting to note that individuals attempt to compensate for these losses by searching for new sources of self-esteem, an ego need that could clearly be borne in mind by charities soliciting gifts from this age group.”

Source: Adrian Sargeant - Jen Shang; ID, Death & Bequest Giving, Sept. 2008
Ettie’s will said a lot about her. What does your will say about you?

Although Norfolk math teacher Ettie Fearing Cunningham died in 1989, she and her beloved husband Robert, who died before her, live forever because of the gift she put in her will.

Cunningham Scholarships are helping 22 students attend college this year. Hundreds of past recipients – some of them honored as teachers of the year – are already making our world a better place.

Order your free bequest guide to learn how easy it is to leave a gift for your life’s passion. Call us at 757-622-7951 or visit leaveabequest.org.

Adding Charity to Your Will or IRA

A quick guide to the pleasure and promise of charitable bequests.
Talk about the importance of bequests to the organization.
Dear Tom,

Doris and I have a little job for you, if you will help us.

Actually, it's more of a calling than a job.

For true believers.

Here's our simple wish: we want the Connecticut Forum to be around forever.

We've already been around 20 years. The model is pretty much perfected. We have all sorts of plans and new ideas.

But we don't have an ensured future.

Not yet. Not today.

To remedy that, CT Forum has set up a new Legacy Society.
Sell endowment. Great offer.

It’s as close to “immortal” as humans get.
“I can live on in perpetuity? By forever doing good?”
Endowment

(oldest: est. 1249 at Oxford)

764 years later, want this? Or this?
Not bad, Bill.

William of Durham died childless. 764 years later his kind act is still turning poor kids into elite university graduates.
Endowments grow.
Major sales point.
Over 50 years, a $20,000 bequest will grow to $368,000+ in principal and make $300,000+ in grants.

Rhode Island Foundation calculation
Bequests are exclusively a communications problem.
Mention ease

“All it takes is a quick phone call to your lawyer, to add a charitable gift to your will.”
It takes as little as 15 minutes to change the world as you know it.

If you already have a will, a quick phone call to your attorney is all you’ll need to add a charitable gift.

THE NEW YORK COMMUNITY TRUST
212-686-2563 or 212-686-0010
Wise words from P.T. Barnum, Connecticut native son, philanthropist, political reformer
Without publicity, a terrible thing happens:

Nothing.
To repeat...

#1 reason your donors don’t make a charitable bequest?

“It never occurred to me.”
100 years from now you can still be giving to your favorite charity.

Leave a charitable bequest to your favorite cause or charity... and you create a personal legacy that endures forever.

Our informative new booklet explains everything you need to know about setting up a memorial fund, a scholarship fund... and more.

THE RHODE ISLAND FOUNDATION
(401) 274-4564 • www.rifoundation.org

For your free brochure, call: (401) 274-4564, email: bequests@rifoundation.org, or write:

NAME

ADDRESS

CITY

STATE, ZIP

Mail to:
The Rhode Island Foundation
One Union Station
Providence, RI 02903

© Tom Ahern | © 2013
Leaving a Bequest to Charity
through The Rhode Island Foundation
What are you waiting for?
They’re not getting any younger.
“The best time to plant trees was 20 years ago. The next best time is NOW.”

Source: on the subject of bequest marketing, via For Impact
“It is in the fourth quarter now. Birth rates dropped 25% in the U.S. between 1925 and 1935. This segment of the population is now age 68 to 78. In other words, the population who will be leaving bequests is about to start a DOWNWARD trend that will not reverse until 2017.”  -- Robert Sharpe

Source: quoted by Mal Warwick, March 2004
Translation...
You probably missed the last party. Don’t miss the next one.
“For those who think the generational transfer will automatically flood their organizations with resources, it’s time to think again. Without putting in the hard work of generating these planned gifts, 90% of donor mortality will simply result in lost current giving.”

Source: Russell N. James III, University of Georgia, March 2009
Boomers (those born between 1946 and 1964) began to outnumber their elders in the donor-aged population starting in 2010. This monster demographic group is going to be the backbone of charitable giving from now until the mid-2030s.

Source: Jeff Brooks, Future Fundraising Now, 2011
Ground Zero: Board commitment
Rationale:
If your board won’t support your organization, why should anyone else?
Start a legacy society
You can’t thank them when they’re dead.

Thank them abundantly now.

And make them feel special.
Hold an annual general meeting for your organization as a way of meeting prospects. Hold it at 11 AM. Provide a light lunch. Have someone stand up and say the vision statement, then give the annual review.

Good tip from Richard Radcliffe
Every year send an annual review to every legacy pledger, summarizing your organization’s accomplishments and accounts.

Good tip from Richard Radcliffe
Never say die.
Inform. Remind. Repeat.
Most donors (more than 90%) are happy to consider putting a charitable gift in their wills ... yet few (under 10%) have done so.

Inertia is your enemy.
Repetition is your friend.
Results vary.
Patience is a virtue.
“It takes an average of seven years for a gift planning program to mature to the point where planned gifts are materializing, and it takes three to five qualified prospects to secure one planned gift.”

Larry Stelter’s new book
SUBSCRIBE to my free how-to e-newsletter... www.aherncomm.com