If you take away only one thing in this workshop I hope it will be this:

It’s not about you.

It’s not about the money.

How do you conduct a successful Legacy ask?   Be sure that your donor is the center of the conversation.

*Bring them joy. Conduct a Mitzvah. Leave your agenda at the door.*

How is that done?

1. **Be comfortable:** First, start with yourself.

Get comfortable with your own end-of Life gift.

Get comfortable with the information about Life and Legacy.

Get comfortable with the open ended questions you are thinking of using. Wear clothes you feel comfortable wearing.

1. **Setting:** Ask for a meeting in a relaxed, quiet, and personal setting, such as the donor’s home or your home.

At all costs, avoid the work place setting or coffee shop. Evenings are best, since they tend to be open ended and unrushed. Don’t schedule a time that is sandwiched between many other busy things.

Take some yoga-breaths. Relax.

1. **Open a door to Joy:** You are here to conduct a mitzvah, by encouraging someone to think about their legacy, their life, and the reflecting back the things that mean the most to them through an after-life gift.

That means matching them to their joys, not yours.

* 1. **Ask questions:** See some sample questions that can evoke deep and meaningful conversations.
  2. Enjoy, don’t rush the conversation.
  3. Listen, reflect back what you hear.
  4. Look for opportunities to match the donor’s own story to a legacy gift that is meaningful to *them*.

1. **ABC – Always Be Closing:** Offer more information. Let them know that you can help. Be trust-worthy.
2. **Thank:** Thank with a personal note. Follow-up if you promised to follow-up.

Simple outline

* What?
* So What?
* Now What?

I use this outline to move a conversation along, as in:

* **What** did you do in your life? What was meaningful to you? What do you want people to remember about you?
* **So what** did that mean to you? **So what** would you like to do to make a difference?
* **Now what** would you like to do?

**20 Open-Ended Questions**

1. Where did you grow up?
2. What did you learn from your childhood experiences about being Jewish? How did it shape your values?
3. How and why have you settled on your life’s work?
4. What’s the best business decision you’ve ever made? How so?
5. What’s the best personal decision you’ve ever made? How so?
6. What do you think is important about being Jewish today?
7. What are the ages, names of your children? Grandchildren? Where do they live?
8. What do they know about your life? How connected are they to their Jewish heritage?
9. If you could pass along a lesson to (your grandchildren) (other organizations like us) what would that be?
10. What do you love to do on a day off?
11. Where do you (did you) volunteer? *(\* Important for women’s philanthropy)*
12. How have you been involved with other organizations? What was that experience like?
13. What do you know about our organization’s mission, vision and work?
14. How well do you know our programs? Which ones? How did that come about?
15. What do you believe are the perceptions of our organization (nationally, in the community, region)?
16. Which Jewish (and non-Jewish) organizations do you hold in high regard?
17. To what extent does our mission (vision, work) dovetail with your beliefs? How so?
18. How would you want to be remembers by your loved ones?
19. What lasting impact would you like to have?
20. Would you like to hear more about how leaving an end-of-life gift could make a difference?

**Follow-up Questions**

1. How so?
2. Can you clarify that?
3. Can you give me an example of what you mean?
4. Can you say more about that?
5. How did that come about?
6. What did that mean to you and your family?
7. How strongly do you feel about that?
8. What do you think about that?
9. What is most important to you?

**ABC “All About Closing” 20 things you can say.**

1. Have you thought about leaving a bequest that would reflect your life and values? Have you already done so? If so, have you named organizations that you will support with a gift? What organizations? How did you pick those? Did you know it can be simple to update that list without having to update your entire will?
2. I heard you say that you care about . . . , are you interested in hearing how you could express that love through your will or estate plans?
3. I have a lot of information I could share with you. Where would you like me to start?
   1. Would you hear about **how your end-of–life gift would make a difference**?
   2. Would you rather hear more about how you can go about setting up an end-of-life gift?
4. The best time to plant a tree is 30 years ago. The second best time to plant a tree is today. That is why I’m here today to encourage you to join me in making an end-of-life gift to (name). Imagine if our grandparents and parents had done this? Our Jewish community would have a healthy endowment today to support our vibrant Jewish Life. They didn’t think of it, but now we can, and help ensure our Jewish future for our grandchildren and generations to come.
5. The vast majority of Jewish wealth today is left to non-Jewish organizations, such as Universities. Even if 10% of that collective wealth was left to the Jewish Community, imagine what a difference that would make?
6. I am interested in helping you think about giving to something you love and care about, and what to see continue. I hope that some of what you give would be given to the Jewish Community. I personally am support (x) with my own bequest because I feel (y), but I want to help you identify what feels important to you.
7. Did you know that Price, Michael Jackson, Howard Hughes, and Abraham Lincoln all died with a will in place, complicating things tremendously? Having such a document can be helpful for adults at any age. (This is especially for a young couple starting a family.)
8. Would you like to hear about how I made my decision, and what that process was like? Like you, I . . . .
9. How would you like to be remembered? I would like to see if I can help you figure that out, and I think Philanthropy is one way to do that.
10. Would you like to hear more?
11. What other information would you like?
12. I know these kinds of decisions can feel big, and that you might need more time or more information. Would you like me to follow up with you? If so, what information do you need? How soon would you like me to be in touch? Would you like me to call, email, or come visit again? Should we schedule that now? If I don’t hear from you by then, may I please have your permission to contact you again to check in?

**Integrated Ask**

1. I am would like to explore with you’re the fullest expression of your philanthropic love for (name of organization). For many years you have given generously and consistently to our annual fund. Thank you! It’s because of good friends like you that (org.) has flourished. As you know, we are in the middle of an ambitious Capital Campaign. I would love it if you would think about making an additional gift above and beyond your on-going annual support for this important project. In addition, I invite you to think about joining our Legacy circle of friends who have committed to remembering (org) with an end-of-life gift that will build an endowment to keep (org) strong for generations to come. I call it “Today, Tomorrow, and Forever,” – a commitment to help every year with donations that go to work today providing direct help, a donation towards (project) that will help us tomorrow and for generations to come, and a bequest gift that will ensure an enduring impact forever. What do you think? Do you see yourself stepping up with help for “today, tomorrow, and forever?”

**Proactively Addressing Common Reservations:**

1. **Feel, Felt, Found:** I know how you feel, I felt the same way at first. But once I did this myself, I felt differently.
2. **Can’t predict the future**: I am fully aware that your family circumstances might change, and that you can change your will at any time and update it. That is a good thing. Therefore making this commitment now is a reflection of who you are right now, and what you know right now.

1. **I’m not rich:** You don’t have to be rich today to make a significant gift at the end of your life. The beauty of a bequest gift is that it is often far more generous to the organizations you love the most than what you can do in your lifetime. For example, my mother lives simply in her home, lives on a very fix income. When she dies, and her assets are sold, 80% will be split between my sister and I, and 20% will go to 4 organizations she loves. Each of those organizations will realize a donation she could never afford during her life time.
2. **Worried about privacy:** Most people appreciate being recognized during their life-time and thoughtfully thanked for making a commitment to an end-of-life gift. I am also sensitive that others feel this is a private matter and don’t want it discussed, or fear that they will be “pestered” for more money if they make this intension known. If you are reluctant, please know that you can remain anonymous, or let the organization know that you don’t want to be solicited for a larger gift now.
3. **Let the kids decide:** I’ve talked with people who feel that their children should decide what happens to their estates. While I can understand this point of view, I also know that it has been helpful to my children to hear my wishes and intentions. I also know that by having my wishes clarified in my will, will give my kids comfort and structure during a sad time for them. This way there will be one less thing they must decide.
4. **I need more time to think about it:** This can be an on-going conversation that doesn’t have to be rushed. Please take the time to think about it. And yet, what will you know tomorrow that you don’t already know right now? What does your gut feeling?
5. **Will there be a future for (name)?** Perhaps you are worried that (name of organization) is not strong enough to be around generations from now. That is a profoundly sad thought, and one that a healthy endowment could solve. Still, if this is a worry for you, you might think about leaving your legacy to the Jewish Community Foundations of (name here), earmarked for (name of organization). That way, if (organization) closes, the funds will still be available to support another Jewish organization with a similar mission, and so the intent of your bequest will continue to have an enduring impact.

**Questions you must answer before donors will commit:**

* **Why this Organization?** *What is the need, problem or opportunity? Does it offer a solution? Is it a solution I care about?*
* **Why Now?** *Why are you asking me now? What does the future hold for this agency?*
* **Why Me?** *Why do you need me? What difference will my gift make? Will you still care about me after I say yes? Will you forget about me? Or will you just pester me more?*
* **Why should I care?** *Is this emotional and unique?*