



## **HELPFUL HINTS FOR HAVING MEANINGFUL LEGACY CONVERSATIONS**

1. It may take several personal visits and conversations to actualize a legacy gift. That's ok!
2. Refer to the Legacy Conversation slides from Training #2. Review your Case Statement.
3. Remember that legacy giving is not just for the very wealthy!
4. Know if they've made annual or other gifts (not amounts) and thank them for past support.
5. During the conversation pay attention to their story. You'll get information you can use!
6. Start with some small talk that links to this person, specifically, and to your organization:
  - a. Hi Ruth. I saw you across the room at the last concert. How'd you like it?
  - b. Michael, did you happen to see our latest newsletter? (make sure you have one!)
7. Sample opening questions when speaking with a prospect are:

- **"What do you want your legacy to be?" Then, "We are here to help you with that."**
- **"What do you want the future of [organization] to look like?"**
- **"Do you remember when you made your first gift to [organization]?" Then be silent & listen!**
- **"You've been a donor/member/family here for a long time. What do you love about this place?"**
- **"How would you like to be remembered?"**
- **"What type of legacy would you like to leave future generations?"**
- **"May I talk to you about ways to endow/maintain your annual support?"**
- **"What we are doing here at [x organization] is so important. We want to be around for a very long time and hope that you share that vision. We can help you ensure that the organizations you support during your life time are here after you are gone."**

8. This conversation should be about the prospect's vision for the future. Focus on their connection to the organization, NOT on the organization's needs.
9. Remember, you do not have to be a charitable giving expert. You know the basics! Have the list in front of you. Professionals at The Jewish Community Foundation (JCF) can help people regarding how to make their legacy gift work best for them. Remind the prospective donor that through CJL they can leave gifts to the MANY organizations they support and cherish.
10. A few reminders from our training:
  - If you don't ask, the answer is (almost) always NO.
  - Make your own legacy gift first. Then you're asking people to join you.
  - Be a good listener. Leave ideas behind. Follow up with a hand-written, customized note.
  - Thank them for speaking with you no matter what the outcome seems to be.
  - Across the country most people include 3-5 charities in their estate plan. That leaves plenty of room for yours.

**For more detailed gift planning information refer your donors to their attorney or financial planner and keep in mind that JCF professionals are here to assist you and your donors with their gift planning needs.**

*Contact Karen Secular, Create a Jewish Legacy Program Manager,  
(973) 929-2918 or [ksecular@jfedgmw.org](mailto:ksecular@jfedgmw.org)*