Community Impact Bucks
supporting charities, communities, volunteering

TOP TIPS FOR LEGACY CONVERSATIONS

Supporting and communicating with someone who is thinking about writing a legacy can be daunting. Communicating with compassion, honesty and dignity requires the same skills of empathy and kindness that we use with our service users every day

Below are some top tips to help navigate those difficult conversations:

1. PREPARE YOURSELF AND THE ENVIRONMENT AS MUCH AS YOU CAN

- If possible, find a comfortable and private place to have this conversation and somewhere you will not be interrupted.
- If over the phone, check if they are in a suitable place to talk.
- Support yourself – who can you talk with to debrief?

2. FIND OUT ABOUT THEM

Ask the questions:

- How did you get involved with our organisation; when did you make your first gift?
- Why have you remained a loyal donor all this time?
- What is the most meaningful experience you have had at this organisation?
- What are your favourite things about the organisation?
- What are your dreams for the future of the organisation?

Try to understand their personal commitment to your organisation beyond your "good work."

3. LISTEN

Listen. You should be doing 30% of the talking and 70% of the listening!

Whatever you hear–accept it and use to navigate through the rest of the conversation.

If the donor presents you with an unanticipated situation (upset at organization for some reason, financial challenges), don't get defensive, work with the information provided.

4. LANGUAGE

Let the person lead at their own pace, mirror their words and phrases, and allow silence, even though this can be more difficult when over the phone.

Use clear language. Avoid Jargon like Legacy – use Gift in Will instead.

5. MAKING A DIFFERENCE

Share how their gift will make a difference:

- Why legacy support is important.
- Your organisation's vision for the future.
- Why others decided to make your legacy gift.

Focus on their connection to your organisation, ***not*** what your organisation needs.

6. OVERCOME OBJECTIONS

I don't have enough money right now.

"A legacy pledge can be made now and does not require any money at the present time. It is an after-lifetime gift and you can change the commitment, over time, to reflect your changing life circumstances."

I would love to make a large gift, but I want to make sure my children are provided for.

"An estate plan can ensure that your children receive an inheritance at the same time as your personal charitable values are honoured. We're talking about what's left, after you've taken care of everything and everyone else for whom you need to provide."

I am not wealthy.

"A legacy gift can be made by anyone and for any amount. You can designate a small percentage of your estate, a retirement plan, or life insurance policy. And if you need to use the resources you hoped to be able to leave, then that's okay."

I don't have any family, so I don't need to think about gift and estate planning.

"If you die without a will, the law decides who gets what. Even if you don't have a family, you should still create an estate plan that reflects the things you care about."

7. DON'T GIVE LEGAL ADVICE!

Our job as fundraisers is to inspire people to give, make them feel great in the process and for it to be a positive experience. We are not solicitors or financial advisors, so let's stay well away from the Will making process. We can point people in the right direction, but the donor should always make the decision in private with their own independent support and advice.

8. BE HONEST

There may be times when you need to be open and honest with your donors about their intention to restrict a legacy gift. While we want to make sure their gift is spent according to their wishes, we also need to avoid the pitfalls of future restrictions that cannot be met. Be honest and upfront if your charity can't guarantee that projects will be running in the future, instead suggest that they put their wishes as an express wish rather than a condition of the gift, or better yet, make a case that they trust you to decide where the biggest impact will be.

9. THE FOLLOW UP

You've had the conversations and the supporter has pledged a Gift in their Will. Now comes the important part – the ongoing relationship with that supporter. With most Wills taking 7 years from the point of pledge, this is a long-term relationship that we want to develop and maintain.

If we're being honest, we're not always that great when it comes to saying thank you. Getting the thank you right is so important, and worth spending time on. Make sure it is genuine and think outside the box – maybe even surprise them. This is your chance to make them feel great for what they have done and reaffirm that it was the right decision for them.

We want to keep in touch with our legacy supporters but doing this too regularly or without any real reason may just feel like you are checking in on them to see if they have died yet! Put yourself in their shoes and really critique every communication – it should strengthen your relationship with them and add value. And of course, only with the right consent.

Good Luck!