

Legacy Society Talking Points for Face to Face Meetings

Open with general conversation about how they are and other common interests based on how well you know them.

1. Thank them for their past support and express the Foundation's appreciation before discussing a legacy gift.
2. Ask open ended questions ("What" or "How" question), such as...
 - What did you think about our letter inviting you to join our legacy society?
 - What do you think your family's legacy will be?
 - How can we help you with your legacy planning?
 - What questions do you need to have answered before you can make a decision?

Note: I find that if I ask yes/no questions, it is harder to get a conversation going. There is great value in building relationships with the organization and finding out what people think. The more they feel connected to the mission, they more likely they are to make a meaningful gift of support.

3. Listen more than you talk. (A general rule for a successful call is to listen 80% of the time and talk 20%.)
4. Provide any information you can, but if you are not sure of the answer, feel free to tell them you'll get back to them. Remember you should never give legal or tax advice. Simply tell stories (with permission) of what others have done.
5. Confirm when you will talk next.
6. Thank them ...
 - a. For considering a legacy gift
 - b. For taking the time to speak with you (whether they make a pledge or not)

Questions or concerns? Call PJ Watters at (509) 624-2606.