


**PG Calc** YOUR PARTNER IN PLANNED GIVING SUCCESS



## Asking Your Donor for Their Largest Gift Ever: A Bequest

**Date:** January 26, 2023  
**Time:** 1:00 – 2:30 Eastern  
**Presenter:** Anne T. Melvin  
Senior Learning Consultant  
Harvard University and Principal,  
Dynamic Fundraising Training, LLC

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Are you going to get a bequest?

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### Outline

- Why do people make bequests? What's the motivation?
- Who are the best prospects for a bequest?
- How do you ask for a bequest?
- What are 4 easy bequests a NON PG officer can ask for?
- How do I follow up after I ask for a bequest? I'm not a tax lawyer or a PG officer

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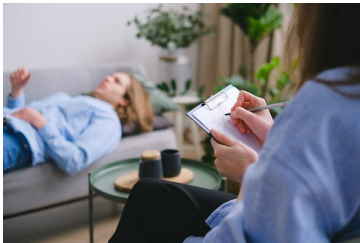
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## Why do people make bequests? What's the motivation?

They hate their kids, right?



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## How many people pay estate tax each year in the US?

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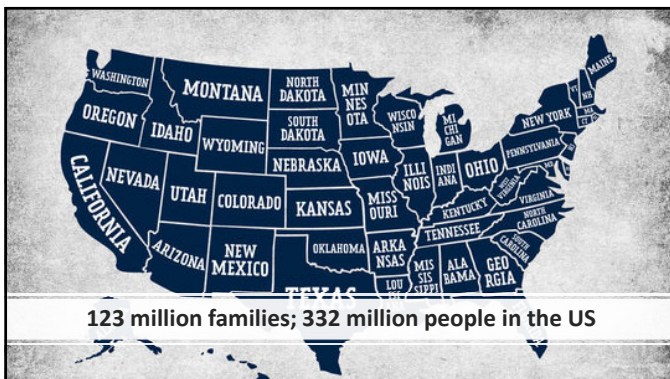
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**123 million families; 332 million people in the US**

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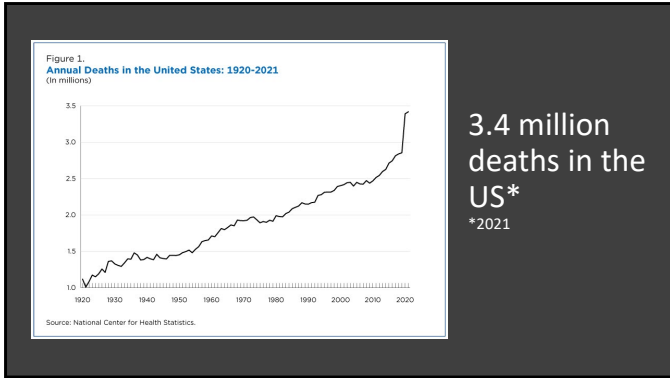
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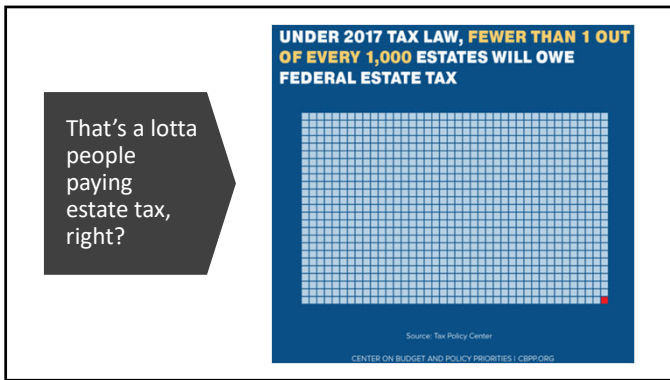
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Why do people make bequests?  
What's the motivation?

They WANT to

**\$46 Billion 2021**

With an exemption of \$12.92 million per person, in 2023, **1,900** estates in the US will owe estate taxes.




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They still hate their kids, right?

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**Outline**

- Why do people make bequests? What's the motivation?
- Who are the best prospects for a bequest?
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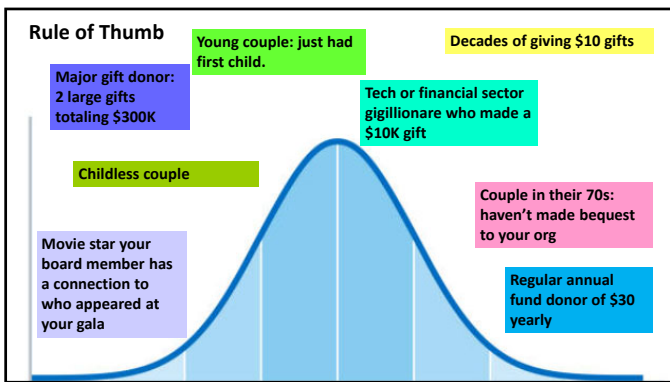
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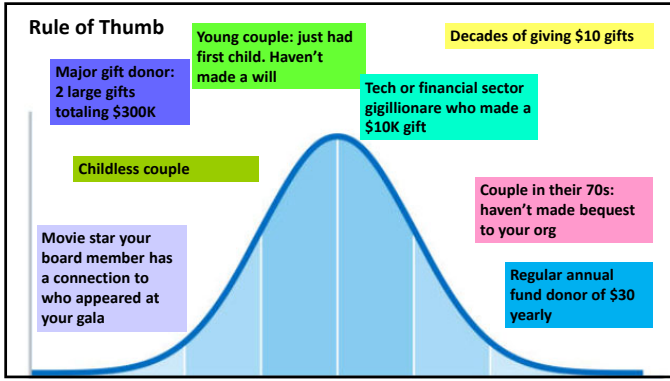
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**PG Calc** YOUR PARTNER IN PLANNED GIVING SUCCESS **Outline**

Why do people make bequests? What's the motivation?

Who are the best prospects for a bequest?

**How do you ask for a bequest?**

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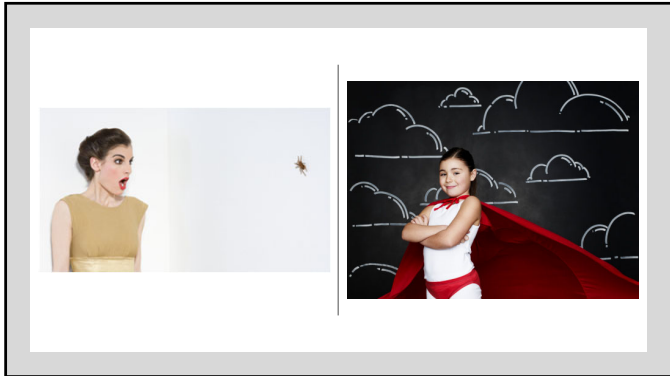
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Timing asks (when you ask) and 'How' asks  
Which fit your style?

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Arrows for your fundraising quiver

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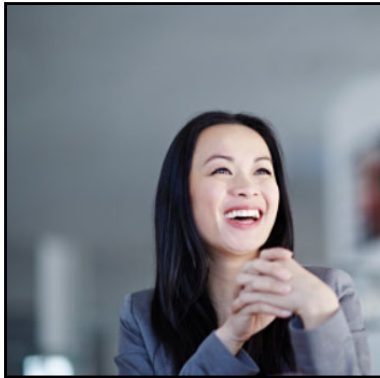
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"That is a terrific gift! I'm delighted you've decided to double your giving from last year! Thank you.

You've been such a terrific supporter of our initiatives over the years which has really helped us make progress here at charity X.

What are your thoughts about EXTENDING the reach of your giving by including our charity in your will or other estate planning?

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"Mrs. Hu, there's a really great way for you to continue the support you've given so loyally year after year that I'd love to make sure you know about.

**Would it be alright** if I took a few minutes to let you know what that is?"

**The 'Mother-May-I' Ask**  
A classic 'how' ask

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**Endowed annual fund ask**

"You've been giving us \$3,-\$5K a year for the past 20 years. After you're no longer here to make your annual gift, we'll lose that significant support.

But if you made an endowment gift, we could CONTINUE to receive that annual support FOREVER.

You could do that by including a gift of \$100K in your will. What are your thoughts about that? "



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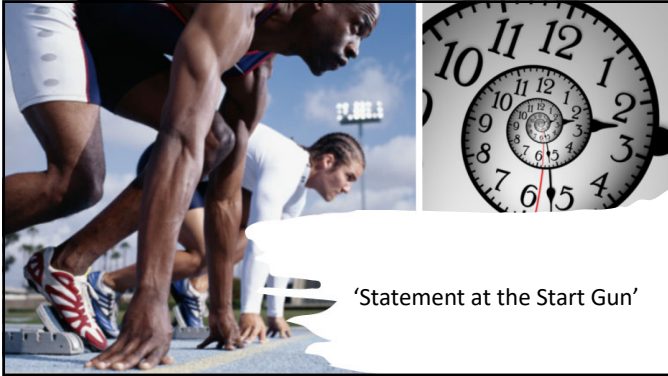
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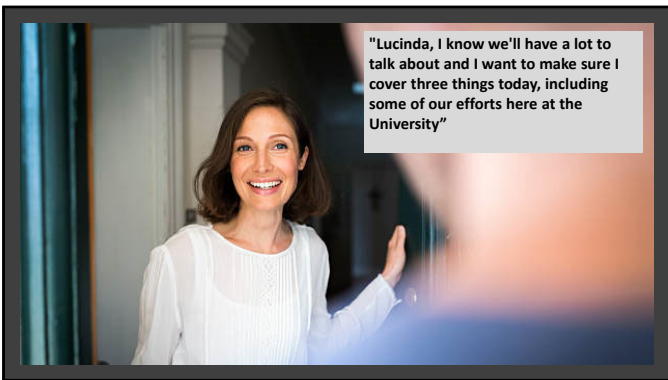
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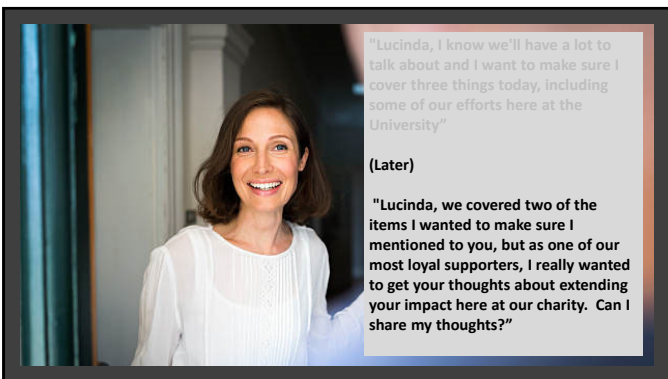
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**The "I'm sorry" technique**

When you need to wrestle the conversation away from a talkative donor!

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"I'm so sorry—I'd love to hear more about your dogs Ripper and Jack, but I'd be remiss if I left here today without bringing up an important topic I've been wanting to discuss with you, which is leaving a legacy at our charity.

Can I do that?"

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The 800-pound gorilla in the room.....Family comes first

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"Deb, you've been such a great supporter. 'd love to talk to you about making a gift through your will to extend the reach of your generosity.

Now there's absolutely no question that in estate planning, **family comes first**. You need to provide for Willa and your husband first and foremost. But, **after you do that, if you think there will be more, a bequest will help continue the support** that you've given so loyally for so many years. Would you be interested in hearing more about how that works?"



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How would you like to be **REMEMBERED** at our charity?"

"You've been such a great supporter endowing X and funding our Y program; what would you like your **CAPSTONE** gift to be?"

"If money were no object, dream big...what would you like to see happen at our charity?"



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When in the meeting do you **NOT** ask for a bequest?



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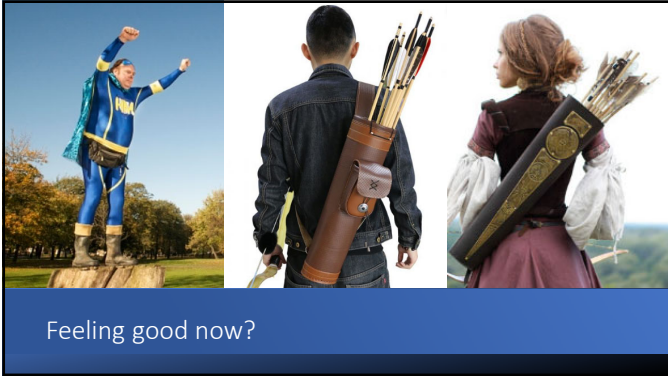
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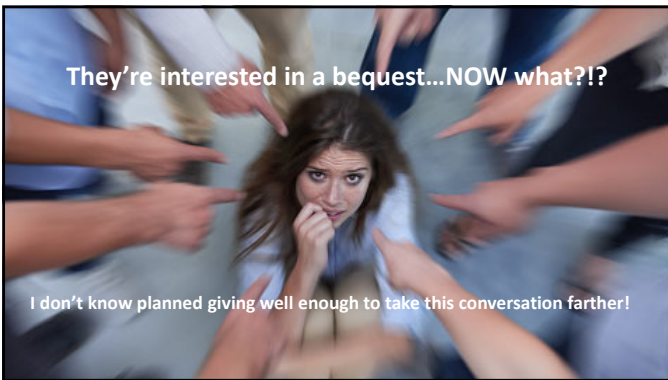
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**YOUR PARTNER IN PLANNED GIVING SUCCESS**

Outline

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How do you ask for a bequest?

What are 4 easy bequests a NON PG officer can ask for?

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**#1 Percentage of Estate**

Easy

Flexible for donor

*"I leave 10% of my estate to your charity"*



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*"I leave \$50,000 to Charity XYZ"*

**#2: Fixed Dollar Amount**



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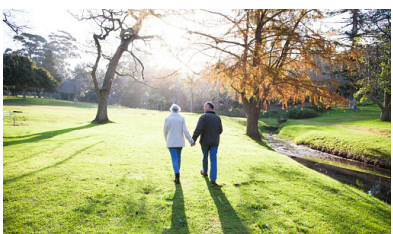
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Takes care of spouse during their life

THEN charity gets a gift

**#3: the 'second-to-die' bequest**

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You job is to bait the hook: get them interested in the bequest idea

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'I don't have a will...or, a lawyer is too expensive'

What if they say....



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“...and we don't want you to either!

Could you envision an amount that would make you feel **happy** about what you're doing for our charity, but leave enough for your kids to be **happy** too?”

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“and we don't want you to either!”

If you would like to see if this might be possible, I could have someone who is an expert on planned giving call you to discuss your options. Would you be interested in that?”



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(vaguely) ‘...I just don't know...’

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(Confirm)  
Absolutely! I do want you to think about it....

**What if they say...**  
Let us think about it...

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ABC (Always Be Closing)

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What will you do differently because of today?



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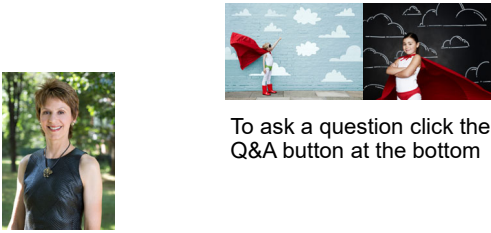
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To ask a question click the Q&A button at the bottom

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**PG Calc** YOUR PARTNER IN PLANNED GIVING SUCCESS **Still Have a Question?**

**Contact:** Anne T. Melvin  
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Harvard University and Principal, Dynamic Fundraising Training

**E-mail:** AnneMelvin@DynamicFundrasingTraining.com

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