



YOUR
PARTNER
IN PLANNED
GIVING
SUCCESS



The Social Work of Fundraising



Date: October 22, 2020
Time: 1:00 – 2:30 Eastern
Presenter: Sherrie Beal
Gift Planning Officer &
Regional Gift Specialist
The Nature Conservancy



Giving in a Time of COVID-19

“For avoiding a premature death, hum a birthday tune under your breath.

Get rid of grime, wash your hands all the time, like my role model, Lady Macbeth.”

- Anne





Poll



How cautious are you right now about reaching out to donors during a pandemic?



Overview of Learning Objectives

- **Prioritize** your planned giving prospects
- Know how to get at your **donor's motivations for giving**
- Avoid jumping to a gift vehicle without **understanding the donor's circumstances**



Who I Am and Why Planned Giving Matters

Professionally



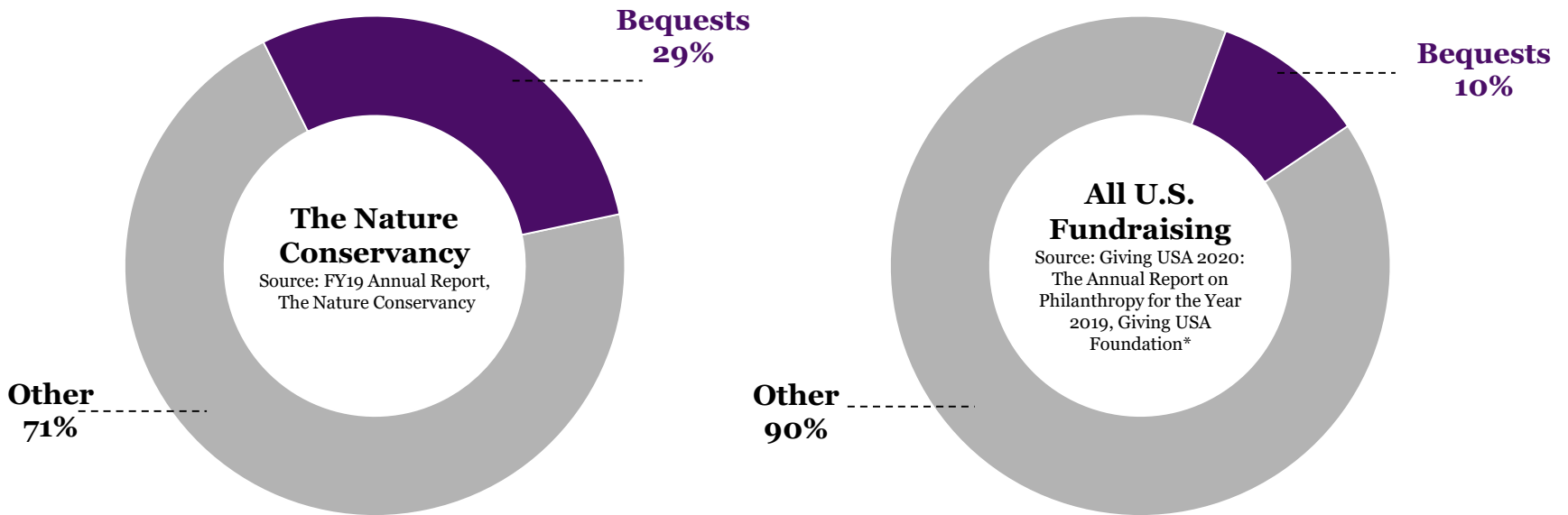
Personally





Bequests are a Significant Source of Revenue

Over the past 5 years, one quarter of annual fundraising revenue to the Conservancy has come in the form of deferred gifts, primarily bequests.



*Latest report data



A Simple Ad

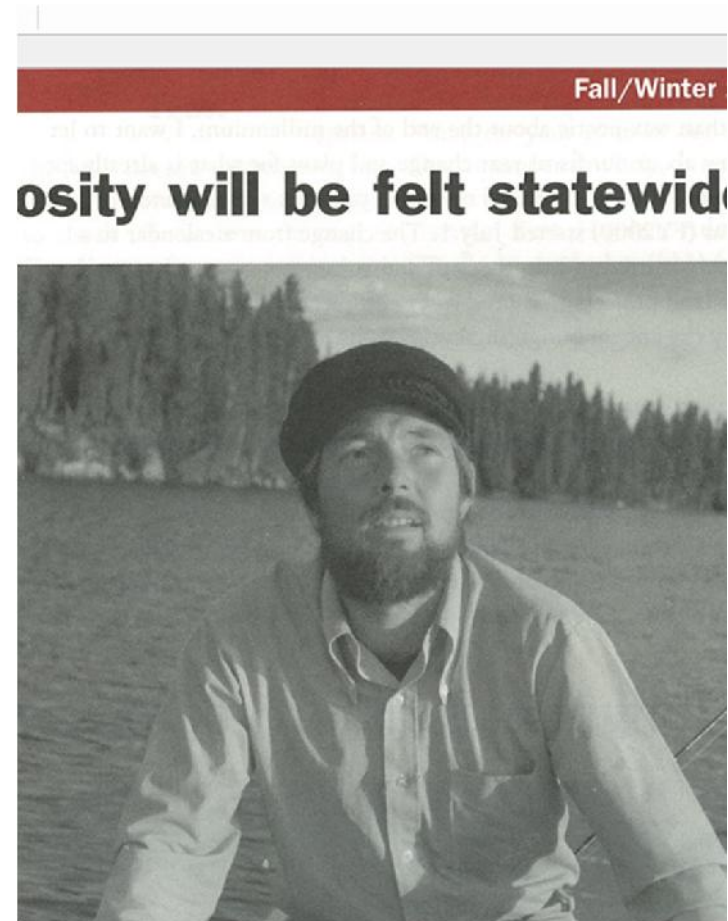
Have You Considered Including Nature In Your Will or Trust?

The Minnesota Land Trust has made a commitment to conserve land and water resources in our state forever.

A gift through a will or trust (or through a beneficiary form), can shape the future of conservation in Minnesota.

For more information (including sample will language), please write or phone Sherrie Beal at.....

Join our Legacy Society today!





Michael's Legacy & Lessons in Facing Death

"I saw your ad in the newsletter, and I would like the language to include MLT in my will."

"I have always loved the outdoors".

"I'm afraid I have no time: I'm dying."



Michael's Legacy

\$400,000

the largest gift to date from an individual to a small, nonprofit



Resources & Tips from Real Life

- Sometimes “I am sorry” and “Thank you” is all that you can say.
- People are touched by handwritten notes and genuineness.
- Many of our supporters simply want to put their affairs in order and our service to them is helping facilitate that.
- Read “Being Mortal” by Atul Gawande.



Giving in a Time of COVID-19

“I’m bored; why not work on my estate plans?”

“TNC is a strong company; we as donors have to invest in making it stronger”.

“[The pandemic] makes us reflect how we live going forward”.





Prioritize What You Do



"It's better to do a few things well vs. too many things poorly."

- Former Board Member



Communicate You're Open

SHARE f t in

Choose the Planned Gift That's Right for You

Whether your stage in life, planned giving can benefit you and your loved ones while helping to protect nature for generations to come. Some planned gifts have an impact now, some after your lifetime. Many offer tax savings, and some even provide you with income for life. Explore your options here, or reach out to our experts—we're happy to help every step of the way.

REQUEST MORE INFORMATION ACCESS NOW

The Nature Conservancy

You Can Trust the Conservancy!

Charity Navigator Norton

Contact A Gift Planning Specialist.

You can further your charitable and financial goals and protect nature by making a planned gift to The Nature Conservancy. Our specialists can help answer any questions you have, and will work with you to find a gift that best fits your unique situation.

Please fill out the form below to contact our team; a specialist will respond in 2-4 business days. You can also contact our team directly at (833) 336-PLAN or legacy@tnc.org.

Let us know if you've included TNC in your estate plan, or would like more information about doing so.

- I have made a gift to TNC in my will or trust.
- I have designated TNC as a beneficiary of a retirement, life insurance, brokerage or other account.
- I would like more information about making a gift to TNC through my estate plan.

Webpage & Response Form

The Nature Conservancy

Long Live Your Values

Together we can protect the world we love.

If you wish to name The Nature Conservancy in your will or estate plan, or designate us as a beneficiary of your retirement accounts or life insurance, please name us as:

The Nature Conservancy, a nonprofit corporation, organized and existing under the laws of the District of Columbia, with principal business address of 4245 North Fairfax Drive, Suite 100, Arlington, Virginia 22203

Our tax identification is: 53-024652

How Your Gift Will Be Used

The Nature Conservancy uses bequests to support global conservation priorities unless otherwise specified by the donor. If you would like your gift to be used in a place or by a program that matters to you (such as a state or country), please contact us for help with designation language and to ensure your wishes can be met.

(877) 812-3698 | legacy@tnc.org | nature.org/bequest

Direct Mail Response Device



Your Prospects—Prioritized

- People **who care** about what you do:
 - Long time members
 - Board members (Legacy Ambassadors)
 - Volunteers
- People **who have a stake** in what you do:
 - Passion for cause
 - Benefited



Your Prospects—Prioritized (cont'd.)

- People With Wealth Indicators
- People Who Live Simply
- People Whom You Don't Have To Share
- People With Complexities & Stuff
- People Who Are Older...but not too old



When Marketing and Our Donor's Timing Converge



Dear Hank and Sharon,

To make a gift of any kind to The Nature Conservancy is an act of generosity.

To make a long-term gift—one derived from the work of a lifetime—is to make a commitment beyond measure.



GIFT PLANNING | 4245 N. FAIRFAX DRIVE, STE. 100 ARLINGTON, VA 22203

NATURE.ORG/LEGACY

An American white pelican takes off from the water at Klamath Bird Observatory, Oregon.
The Nature Conservancy's mission is to conserve the lands and waters on which all life depends. From roots in historic land acquisition to cutting-edge research that influences global policy, TNC is working to create a world where people and nature can thrive. © Mitch Walters/TNC Photo Contest 2019





Sharon and Hank – Loyal Donors



From \$100 to **\$5 million.**

Hank and Sharon
LOYAL DONORS



Sharon and Hank – Loyal Donors

- Lived in “Millionaire next door” neighborhood
- Donating to TNC 20+ years, \$100 year (“commitment” to cause)
- Wealth Ratings (“capacity to give”)
- In 2003, increased their annual gift to \$1,000 (“trigger”)
- We cultivated; they contacted us when their circumstances demanded planning



LIFE EVENTS

Retirement
Care for Family
Death of a loved one



WEALTH EVENTS

Sale of Business
Stock Market Gains
Downsizing



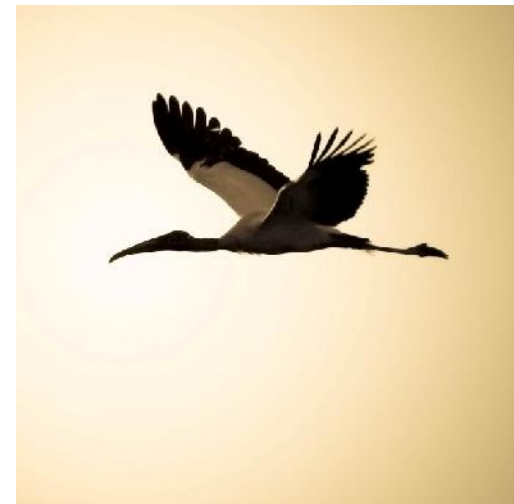
TIMING

**IS
EVERYTHING!**



Ray's Gift: Stock

- "I have a tax problem"
- "I own too much of Amazon stock"
- "I don't need income"
- "I want to support TNC now"
- "I forget things"



Ray
STOCK DONOR



Poll



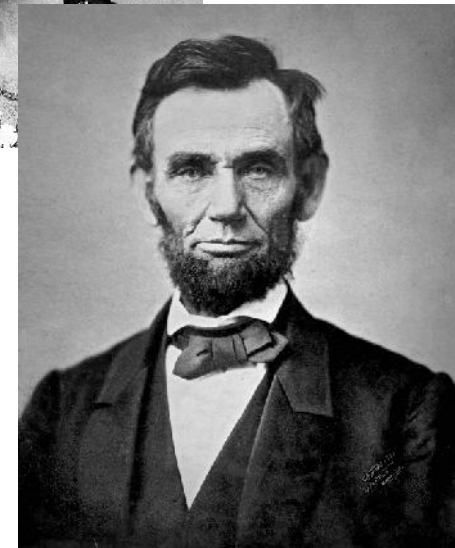
Have you encountered donors with memory issues?



First, Get Your Own Plan in Place

60%

of Americans do
NOT have an
estate plan





Talk to People While They are Present





Prioritize But Don't Overlook

\$325K Average size of estate gift to TNC

29% Fundraised Revenue from Estate Gifts

25% TNC donors who are loyal donors

2% TNC members that we know has TNC in plans

Prioritize but do not overlook anyone who has your organization in their plans.



Importance of Touchpoints

\$325K

LEGACY CLUB MEMBER

\$166K

NON LEGACY CLUB MEMBER

*NUMBERS INDICATE THE AVERAGE SIZE OF AN ESTATE GIFT TO TNC



Start the Conversation

Know what questions to ask donors to get at **motivation, interest, capacity and competency.**

- **Have you had to sort out the estate of others or been the beneficiary of the estate in a positive or negative way?**
- **Do you have an estate plan in place? What are the barriers for you in planning?**



Be Cautious of Donors Motivations



Seeking tax breaks, revenge or the impossible



Start the Conversation

Know what questions to ask donors to get at motivation, interest, capacity and competency.

- **Do you recall what influenced your first gift to our organization?**
- **Would you like to become more involved with our organization? What might that look like?**



Real Life Answers

“I’d like to volunteer and become more familiar with your work.”

“I would love to see more of your projects or volunteer, but I am just too busy. I would like to do more”.

“No, I am giving all that I can give and I need to save what I have for (my old age) or (the kids).”



Start the Conversation

Know what questions to ask donors to get at motivation, interest, **capacity and competency.**

- Have you talked to your children (or loved ones) about your plans?
- **If you made that gift to us, would you have sufficient resources to cover your other needs?**
- I need to remind you that [this particular gift] is irrevocable and we would encourage you to get outside counsel.



Start the Conversation

Know what questions to ask donors to get at motivation, interest, capacity and competency.

- How can I be of help?
- **Would it be helpful to you if I touched base with you from time to time? How often?**
- I would be remiss if I didn't ask you if you have considered including charity in your estate plans?



Don't Lead With the Gift Vehicle



Find out your donor's motivations and circumstances first.



Can We Avoid Leading With the Gift?



"I have a property that I would like protected, but I can't afford to donate it to you."

- Jim



Can We Avoid Leading With the Gift?

“What is motivating you to come to The Nature Conservancy at this time?”

“What are your income needs?”

“Have you talked this over with your family?”





A Gift Worth Your Time



© Nathan Lovas/TNC

"I just love your organization and I would like to do something for [our cause] through my estate."

"I wish I could do more."



Rules I Live By to be a Successful Gift Planner

- Expand the tent
- Be wary of donors who lead with seeking benefits
- Run from certain gifts
- Be honest



Rules I Live By to be a Successful Gift Planner

- Share credit and expand the relationship
- Know your limitations and lead with your organization's priorities.
- Admit when you don't know the answers
- Use your ears and eyes



Rules I Live By to be a Successful Gift Planner

- Be vulnerable, authentic, sometimes unscripted & SILENT.
- Do not be consumed by the workplace





Questions?





This Presentation is Dedicated to The
Memory of Joey Marxhausen Who Loved
Nature & Whose Mother is a Social Worker
Who Influenced My Planned Giving Practice

Sherrie Beal | sbeal@tnc.org