

Last Will
and Testament



Placeholder text for the will document.



Socratic Fundraising “LEGACY EDITION”

How to ask for the gift in a will without fear or anxiety



Squeamish?

“For many of us, asking for a bequest is akin to asking, *‘So when are you going to die and what are you going to leave us when you do?’*”

-Anne Melvin
Harvard University

Theory



Death is a problem.

Theory



Death is a problem.

People use two solutions.

1. Ignore the problem.

[*Avoidance*]

2. Live on after death.

[*Symbolic immortality*]



Avoidance

- “This doesn’t apply to me”
- “I’ll deal with that later”



Symbolic immortality

Some part of
one's identity –
one's people,
values, or story –
will continue on
after death

Symbolic immortality in experiments

Death reminders make people more

- Protective of their social group
- Resistant to outside groups
- Responsive to group “norms”
- Interested in social prestige, fame, a positive life story, personal heroism, or putting their name on something on something



For a review, see James III, R. N. (2016). An economic model of mortality salience in personal financial decision making: Applications to annuities, life insurance, charitable gifts, estate planning, conspicuous consumption, and healthcare. *Journal of Financial Therapy*, 7(2), 62-82.

Phrasing = preface + ask

The legacy ask usually consists of two parts:

- A preface (motivating the ask or the gift) +
- An ask (making the request)





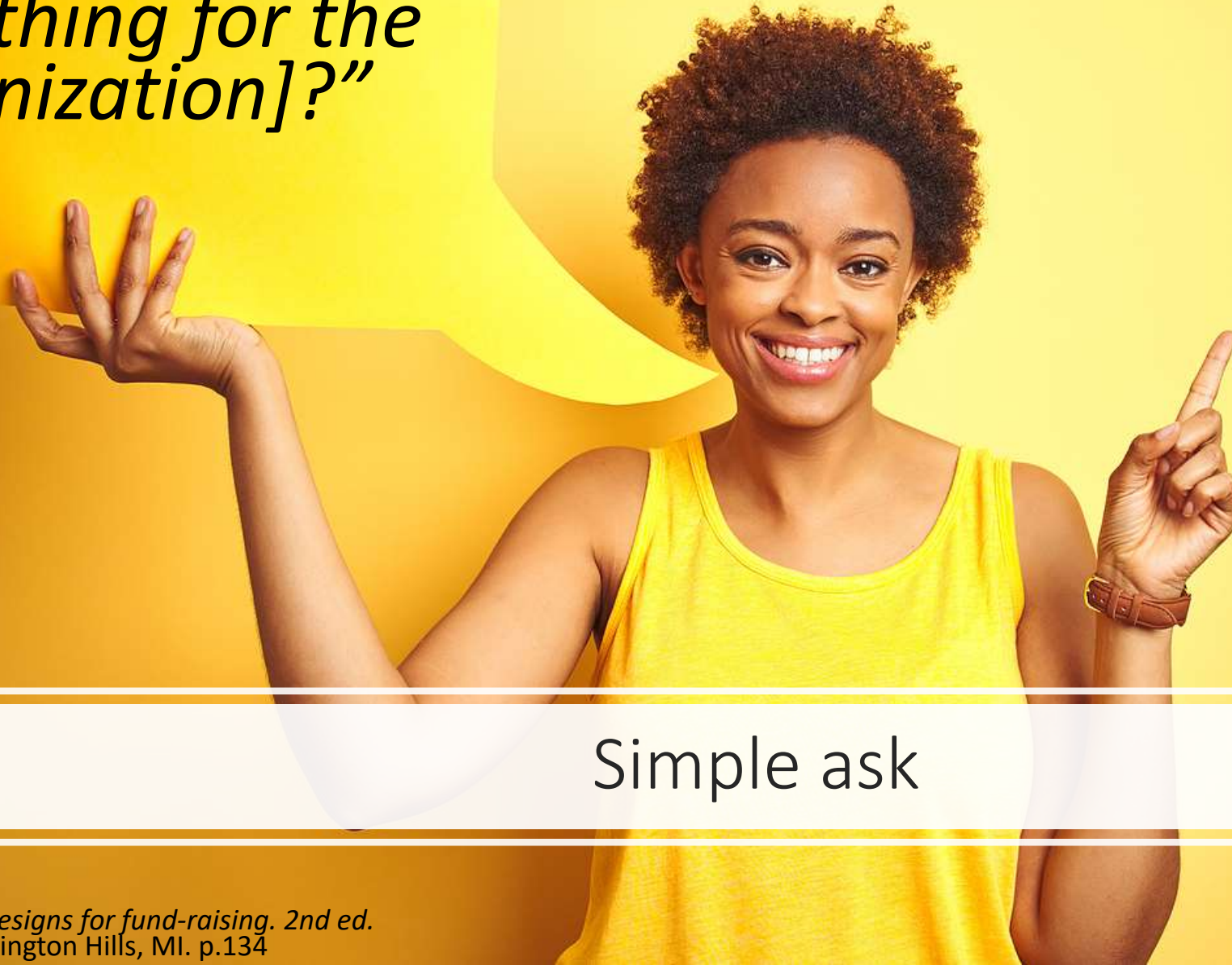
Phrasing =
preface + ASK

- **Simple ask: Will you?**
- **Soft ask: Would you consider?**
- **Softer ask: Thoughts?**
- **Softest ask: Silence after preface**


“Would you be willing to include our organization in your estate plans?”

Simple ask

“Say, Bill, does your will provide something for the [organization]?”



Simple ask




*“Would you
join me as a member
of our Legacy
Society by making a
planned gift?”*

Simple ask



*“Would you join me
in making a legacy
commitment?”*

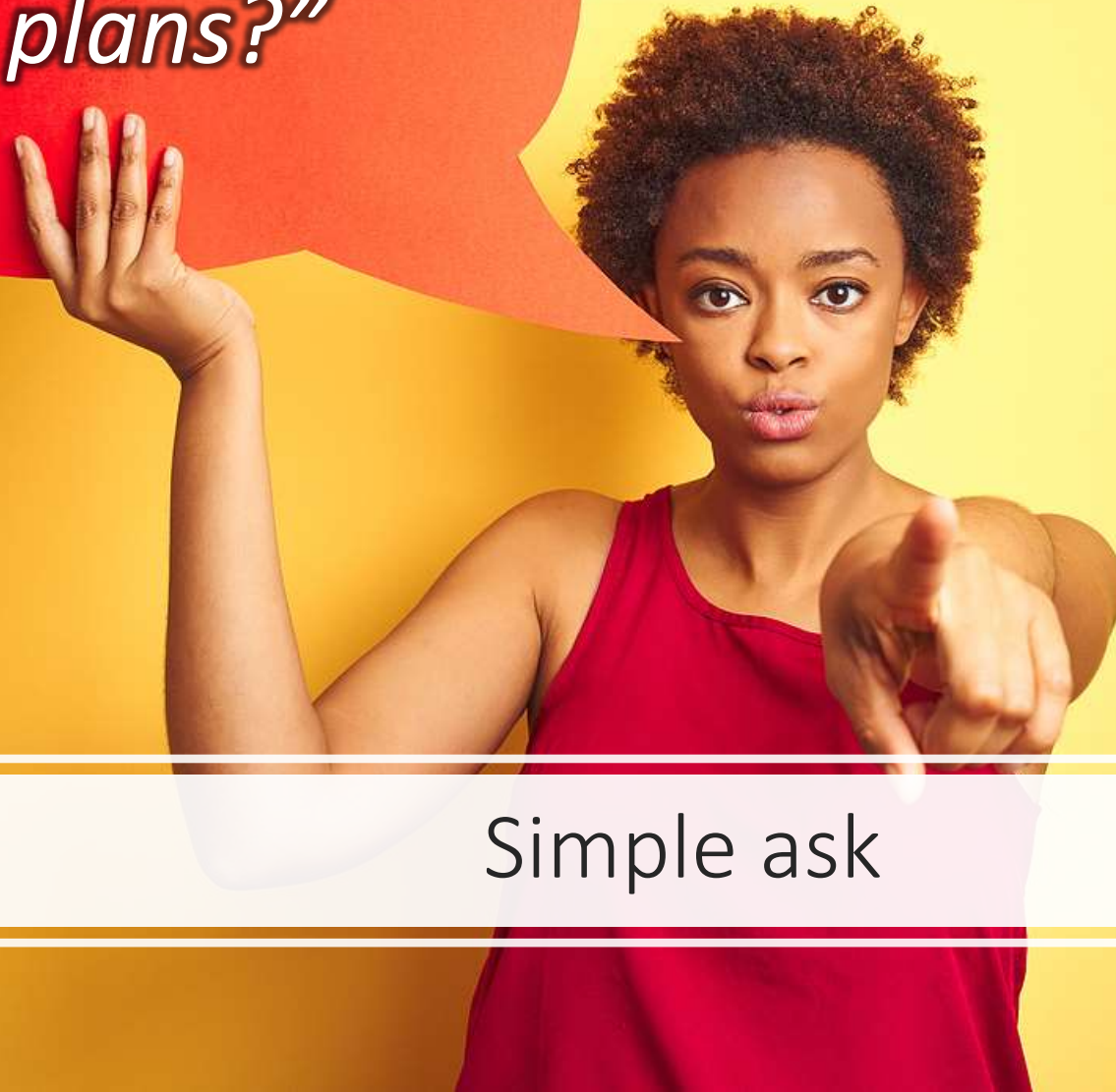
Simple ask



*“Have you
remembered
XYZ in your
will?”*

Simple ask

*“Can you tell me
if we are
included in your
will plans?”*




Simple ask



Phrasing =
preface + ASK

- Simple ask: Will you?
- **Soft ask: Would you consider?**
- Softer ask: Thoughts?
- Softest ask: Silence after preface




“Would you be willing to consider including us as one of the nonprofit organizations in your will?”

Soft ask: Would you consider?


“Would you consider... including us in your estate plans?”

Soft ask: Would you consider?

A man with glasses and a blue shirt is holding a large white speech bubble. He has a surprised or questioning expression on his face. The background is a solid yellow color.


“Will you consider putting this organization in your will?”

Soft ask: Would you consider?

A woman with dark hair and glasses, wearing a white off-the-shoulder top, is shown in a thinking pose. She is holding a large white speech bubble that contains text. The background is a solid orange color.


“Would you consider leaving a (specific amount or percentage) of your estate to our organization?”

Soft ask: Would you consider?

A woman with dark curly hair, wearing a light blue blazer, is shown in a thoughtful pose. She is looking upwards and to the right, with her hand resting on her chin. A large white speech bubble is positioned to her left, containing text. The background is a solid light pink color.


“Would you consider a pledge commitment that isn’t paid until you pass or when you no longer need it?”

Soft ask: Would you consider?

A smiling woman with short dark hair, wearing a bright yellow t-shirt, is shown from the waist up. She is holding a large white speech bubble in her right hand. The background is a solid light blue color. The text inside the speech bubble is in a black, italicized font.

“Would you consider making a legacy gift?”

Soft ask: Would you consider?

A woman with long dark hair, wearing a light green top, is smiling and looking to her right. She is holding a large white speech bubble with her right hand. The background is a solid yellow color.

“Of the types of planned gifts that we’ve talked about, which one would you consider?”

Soft ask: Would you consider?



Phrasing =
preface + ASK

- Simple ask: Will you?
- Soft ask: Would you consider?
- **Softer ask: Thoughts?**
- Softest ask: Silence after preface

“Do you know that we have a legacy society that recognizes our donors who have included our organization in their future plans?... Is that something you and I should be talking about?”

“What would you say to someone who might be considering including us in their last will & testament?”

“What are your thoughts about making this kind of gift?”

Softer ask: Thoughts?



Phrasing =
preface + ASK

- Simple ask: Will you?
- Soft ask: Would you consider?
- Softer ask: Thoughts?
- **Softest ask: Silence after preface**

Ask (“challenge”) phrase: Preferences? Why?

1. Simple

- A. “Would you be willing to include our organization in your estate plans?”
- B. “Say, Bill, does your will provide something for the [organization]?”
- C. “Would you join me as a member of our Legacy Society by making a planned gift?”
- D. “Would you join me in making a legacy commitment?”
- E. “Have you remembered XYZ in your will?”
- F. “Can you tell me if we are included in your will plans?”

2. Soft

- A. “Would you be willing to consider including us as one of the nonprofit organizations in your will?”
- B. “Would you consider ... including us in your estate plans?”
- C. “Will you consider putting this organization in your will?”
- D. “Would you consider leaving a [specific amount or percentage] of your estate to our organization?”

- E. “Would you consider a pledge commitment that isn’t paid until you pass or when you no longer need it?”
- F. “Would you consider making a legacy gift?”
- G. “Of the types of planned gifts that we’ve talked about, which one would you consider?”

3. Softer

- A. “What are your thoughts about making this kind of gift?”
- B. “Do you know that we have a legacy society that recognizes our donors who have included our organization in their future plans? ... Is that something you and I should be talking about?”
- C. “What would you say to someone who might be considering including us in their last will & testament?”

4. Silence

- A. Use a preface mentioning a gift in a will and then be silent.

People were more likely to agree to “make a gift to charity in my last will & testament.”

than “leave a legacy gift to charity in my last will & testament” or “make a bequest gift to charity in my last will & testament”

Ask research: “Gift in a will”

People were twice
as likely to want
to read about
“gifts in wills”

rather than
“estate giving,”
“legacy giving,” or
“bequest gifts”

Ask research: **“Gift in a will”**

People were
twice as likely
to want to read
about
“will planning”



rather
than
“estate
planning,”
or
“legacy
planning”

Ask research: “Gift in a will”



Not for
“people like me”

- Some people perceive words like “estate,” “legacy,” or even “bequest” as a bit too grand
- But a “gift in a will” applies to everyone

Too narrow?



People were more likely to expect information about

- living trusts
- life insurance
- IRA transfer-on-death
- bank account transfer-on-death

from “gifts in wills” or “will planning” than from “estate giving” or “estate planning”

Long list?



Share interested in reading more on a charity website was,

- 26% for “Gifts in wills”
- 25% for “Gifts in wills, trusts, or retirement accounts”
- 24% for “Gifts in wills, trusts, retirement accounts, or life insurance”

Avoid death phrases

“Make a gift to charity in my last will & testament ~~that will take effect at my death.~~”

Annuity paying “each year you live ~~until you die.~~”



James III, R. N. (2016). Phrasing the charitable bequest inquiry. *VOLUNTAS: International Journal of Voluntary and Nonprofit Organizations*, 27(2), 998-1011; Salisbury, L. C., & Nenkov, G. Y. (2016). Solving the annuity puzzle: The role of mortality salience in retirement savings decumulation decisions. *Journal of Consumer Psychology*, 26(3), 417-425.

The will-making headlines that performed 2X better



“Even if you plan to live to 150, you still need to make a plan.”

“Even if you plan to live to 150, you still need a will. Get started today.”

Leading with LONG life, not death!

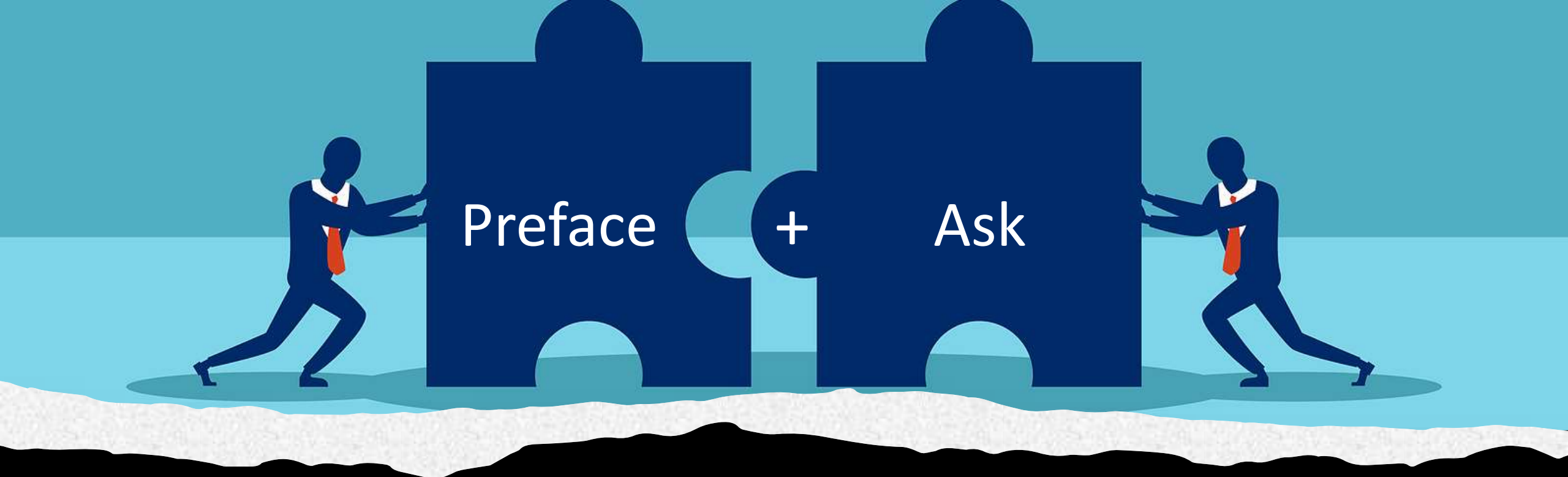
The preface



Even a “naked” ask works.

2,000 people completing will planning,

- Half weren't asked about charity: 4.9% made a gift
- Half were asked “Would you like to leave any money to charity in your will?”: 10.8% made a gift



A preface makes the ask more comfortable or compelling

- The **external issue** preface [*from avoidance*]
- The **identity** preface [*from symbolic immortality*]
- The **victory** preface [*from symbolic immortality*]



External issue preface

People avoid estate planning because it's a death reminder.

So, create a non-death reason to have the conversation or sign the gift now.

- Campaign deadline
- Matching gift deadline
- We've got a problem
- My job is to help you

Legacy campaign deadline

“We’re in a campaign to get 100 new legacy society members before the end of the year, and we’re making great progress... [ask]”



Combined campaign deadline

“So far, we’re at 72% of our campaign goal for current gifts and 68% of our goal for planned estate gifts. You’ve already helped us in the first goal...[ask]”



Leadership campaign deadline

“The new planned giving campaign starts this fall. We’ll be announcing our board participation at the banquet. Signing your planned gift before then could really influence others to take this step ... [ask]”



Matching gift deadline

“If signed by May 1,
planned gifts of up to
\$250,000 will be matched
with a 10% cash donation
in your name from The
XYZ Foundation.”

(For several charities this
has doubled or tripled
planned gifts.)



Phrasing modified from Bequest Matching Form at https://www.aclu.org/sites/default/files/field_document/aclu_legacy_challenge_form.pdf See, Kendrick, J. & Tsai, C. (2017). *Implementing a legacy challenge match program at a major, multifaceted institution*. Presented at the National Conference on Philanthropic Planning, Baltimore, MD

We've got a problem

“We’ve run into a bit of an issue. The number of new people joining our legacy society has fallen off in the last year. Do you mind if I ask you a few questions about your thoughts on this topic?”



We've got a problem

“We need your advice on some new legacy fundraising ads. Would you mind sharing your thoughts on a few examples?”



We've got a problem

“We held a planned giving seminar, but people didn't show up. We're trying to figure out why. So, we're asking donors like you to share your thoughts in a focus group...”



Helping you is my job

“My job is to help donors plan their gifts... This might look at multi-year strategies or even a gift in a will...”

“Part of my job is to show donors how to give smarter. For example, any IRA money inherited by family members triggers income tax. But naming [our charity] avoids those taxes...”





External issue preface

The non-death-related reasons make starting the conversation easier

- Campaign deadline
- Matching gift deadline
- We've got a problem
- My job is to help you

Which of the following approaches would be most comfortable for you? [Type your answer in the chat]

- A. Simply making the ask
- B. Using a preface first (external deadline, help us with a problem, my job is to help you) then making the ask
- C. Sharing a donor story then pausing for a reaction

Which of the following external issue preface types do you prefer?

a. Legacy campaign deadline: “We’re in a campaign to get 100 new legacy society members before the end of the year, and we’re making great progress... [ask]”

b. Combined campaign deadline: “So far, we’re at 72% of our campaign goal for current gifts and 68% of our goal for planned estate gifts. You’ve already helped us in the first goal...[ask]”

c. Leadership group campaign deadline: ““The new planned giving campaign starts this fall. We’ll be announcing our board participation at the banquet. Signing your planned gift before then could really influence others to take this step ... [ask]”

d. Matching gift deadline: ““If signed by May 1, planned gifts of up to \$250,000 will be matched with a 10% cash donation in your name from The XYZ Foundation.”

e. We’ve got a problem

a. “We’ve run into a bit of an issue. The number of new people joining our legacy society has fallen off in the last year. Do you mind if I ask you a few questions about your thoughts on this topic?”

b. “We need your advice on some new legacy fundraising ads. Would you mind sharing your thoughts on a few examples?”

c. “We held a planned giving seminar, but people didn’t show up. We’re trying to figure out why. So, we’re asking donors like you to share your thoughts in a focus group...”

f. Helping you in my job

a. “My job is to help donors plan their gifts... This might look at multi-year strategies or even a gift in a will...”

b. “Part of my job is to show donors how to give smarter. For example, any IRA money inherited by family members triggers income tax. But naming [our charity] avoids those taxes...”

Create your own external issue preface for your own ideal scenario

a. Legacy campaign deadline: “We’re in a campaign to get 100 new legacy society members before the end of the year, and we’re making great progress... [ask]”

b. Combined campaign deadline: “So far, we’re at 72% of our campaign goal for current gifts and 68% of our goal for planned estate gifts. You’ve already helped us in the first goal...[ask]”

c. Leadership group campaign deadline: ““The new planned giving campaign starts this fall. We’ll be announcing our board participation at the banquet. Signing your planned gift before then could really influence others to take this step ... [ask]”

d. Matching gift deadline: ““If signed by May 1, planned gifts of up to \$250,000 will be matched with a 10% cash donation in your name from The XYZ Foundation.”

e. We’ve got a problem

a. “We’ve run into a bit of an issue. The number of new people joining our legacy society has fallen off in the last year. Do you mind if I ask you a few questions about your thoughts on this topic?”

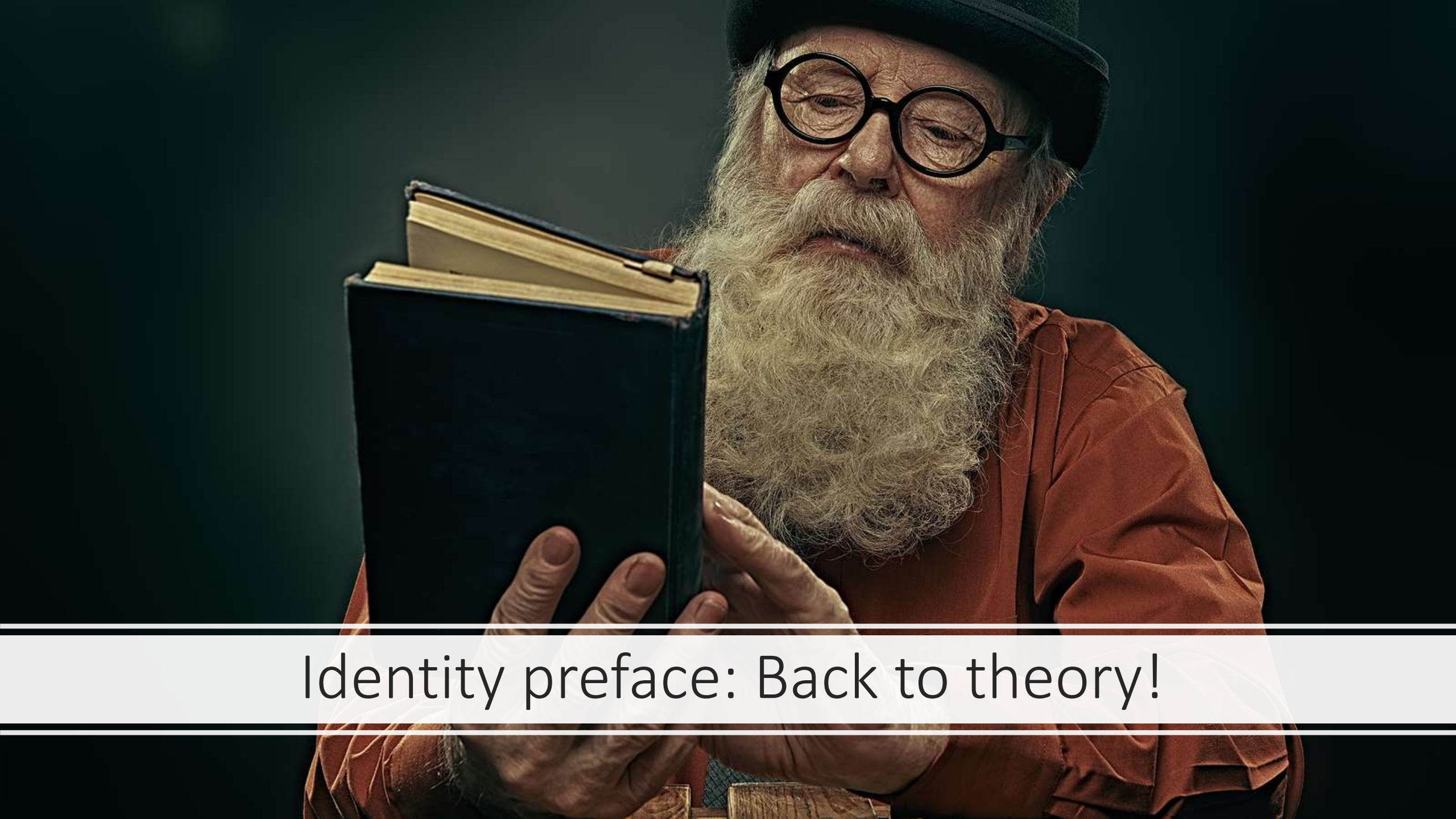
b. “We need your advice on some new legacy fundraising ads. Would you mind sharing your thoughts on a few examples?”

c. “We held a planned giving seminar, but people didn’t show up. We’re trying to figure out why. So, we’re asking donors like you to share your thoughts in a focus group...”

f. Helping you in my job

a. “My job is to help donors plan their gifts... This might look at multi-year strategies or even a gift in a will...”

b. “Part of my job is to show donors how to give smarter. For example, any IRA money inherited by family members triggers income tax. But naming [our charity] avoids those taxes...”



Identity preface: Back to theory!

Steps in a compelling fundraising ask:

Original Identity → **Challenge** → **Victory** →

Enhanced Identity

public (reputation) or
private (personal meaning)

or simply

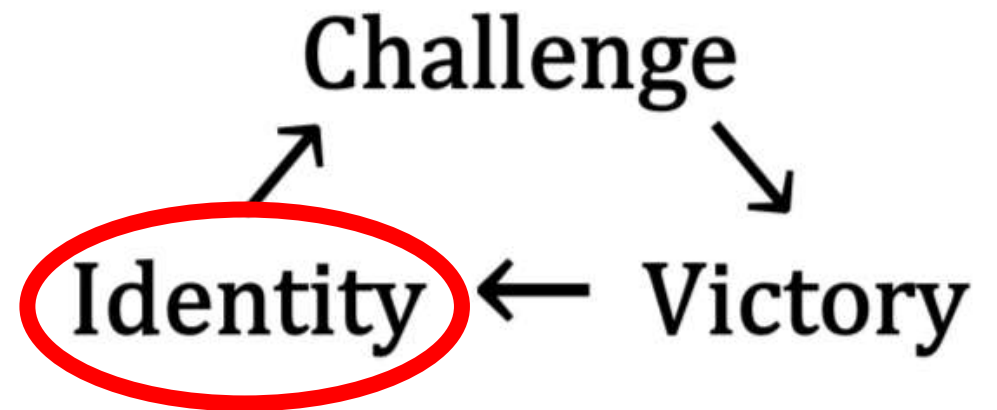
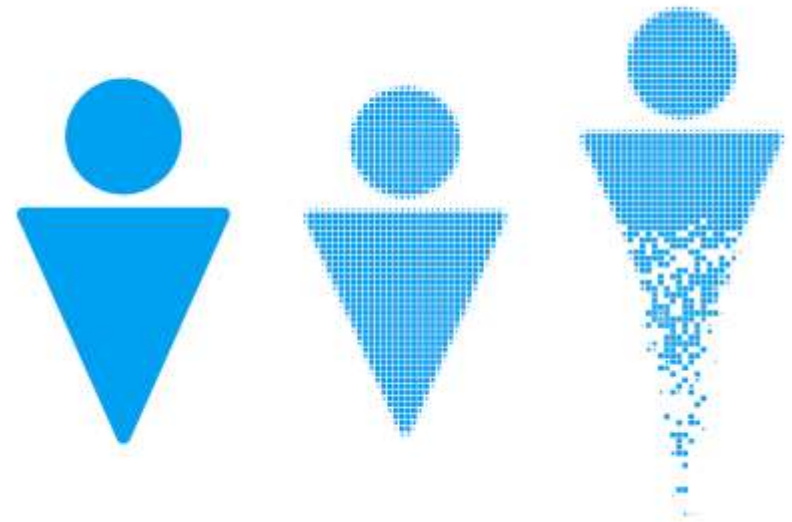
Challenge



Identity ← **Victory**

Death reminders trigger pursuit of symbolic immortality (resistance to disappearing)

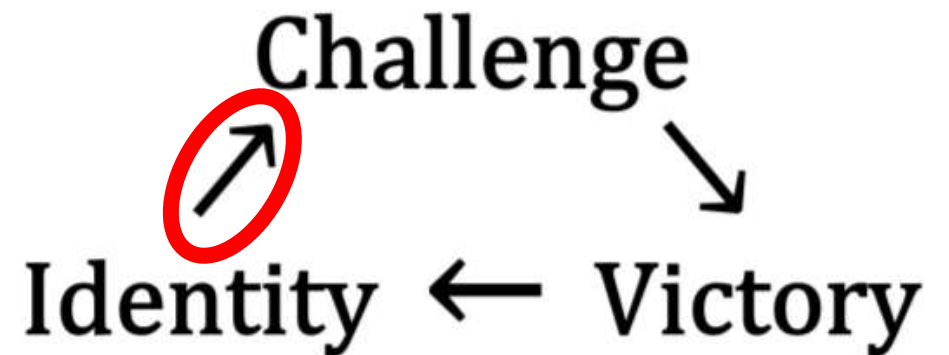
- This increases attraction to ways in which one's identity can live on
- A gift in a will helps when it continues the donor's identity (the donor's people, values, or history)



Identity preface

“People like you make gifts like this”

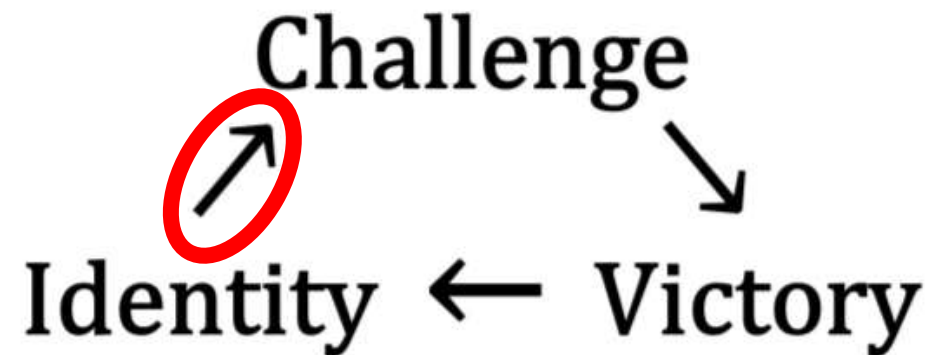
- “You are the kind of person who makes gifts like this”
- “Other people who are similar to you make gifts like this”
 - because of your (shared) identity: history, behaviors, values, beliefs, or group membership



Identity preface examples

“Many donors who give as regularly as you have put our organization in their will; what are your thoughts about doing that?”

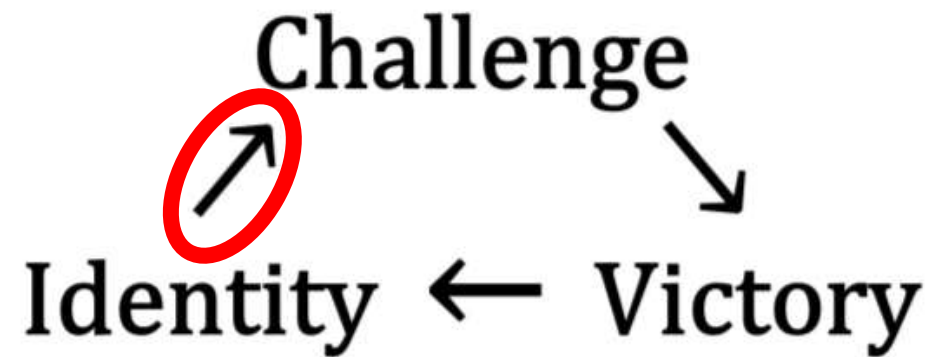
-Anne Melvin, Harvard University



Identity preface examples

“Mrs. Jones, you are such a wonderful and loyal donor. Many of our most loyal donors are including Kent State in their estate plans in order to make an impact beyond their lifetime. Have you ever considered remembering Kent State in your will?”

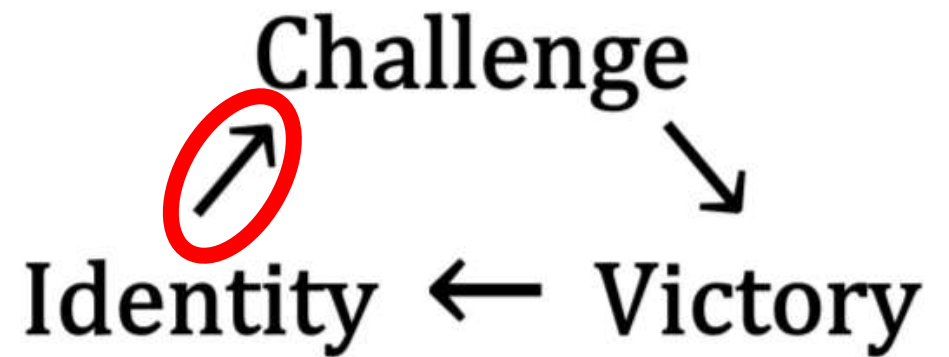
-Mindy Aleman, Kent State University



Identity preface examples

“I can’t say thank you enough for all your support for so many years. Would you consider extending your amazing legacy by including us in your estate plans?”

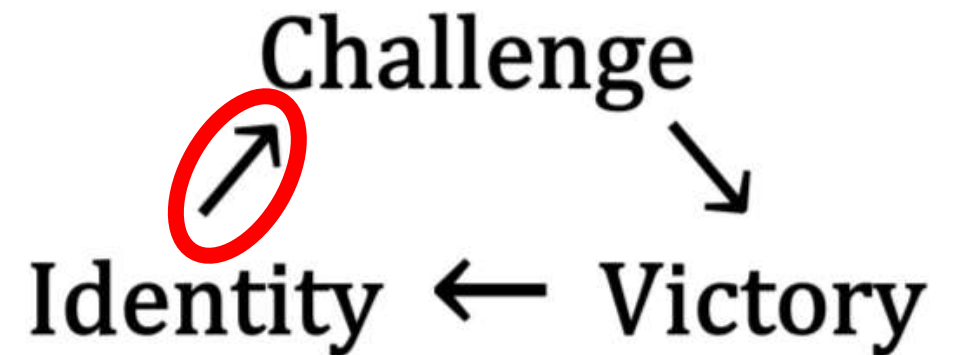
-Jason James Shuba, University of Illinois Foundation



Identity preface examples

“Thank you so much for all your support for so many years – we truly appreciate it. Donors like you who have supported us for so long often include a gift in their estate plans. I’d love to say thank you for that as well if you’ve done so. Have you included us? Have you considered it?”

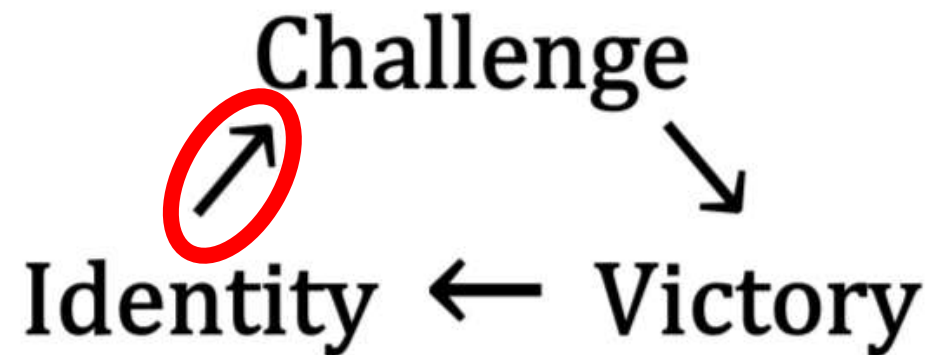
-Jason James Shuba, University of Illinois Foundation



Identity preface examples

“John, you’ve been a terrific supporter of Friends of Shakespeare. I want to thank you for all you have done for us over the years. I’m curious: what are your thoughts about becoming a member of the Fortinbras Society?’ ‘What is the Fortinbras Society?’ *[This allows you to describe other committed members of the society, mention some that he knows...]*”

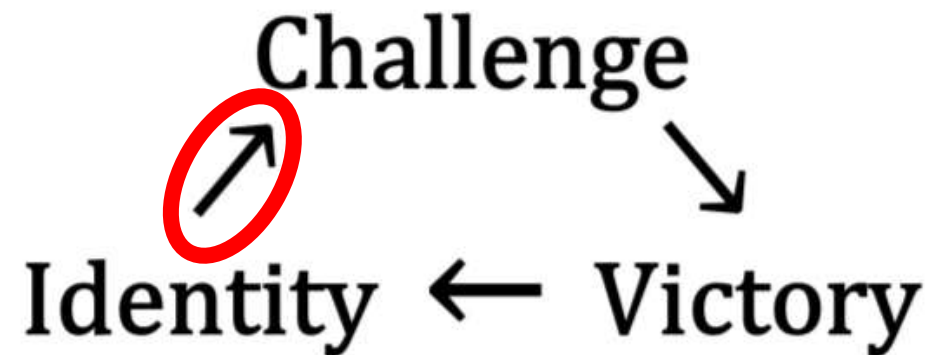
-Anne Melvin, Harvard University



Identity preface examples

“I’ve found the mission so compelling and the programs so meaningful that a few years ago I made a planned gift because I wanted to make certain that my support continued into the future. Other people I’ve met have wanted to make sure that their support continues as well and have let us know that they’ve made legacy gifts too. Could I take a few minutes before we’re finished here and tell you, briefly, about our legacy giving program and how we plan to use these gifts?”

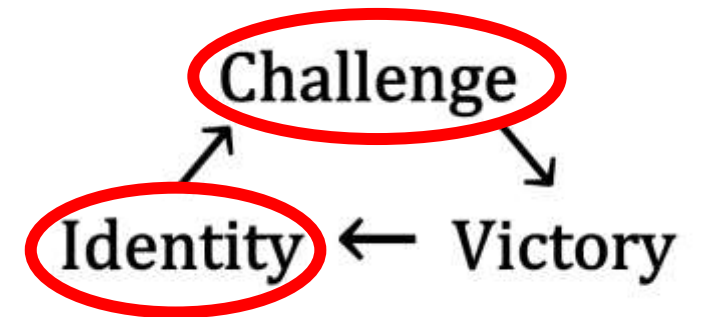
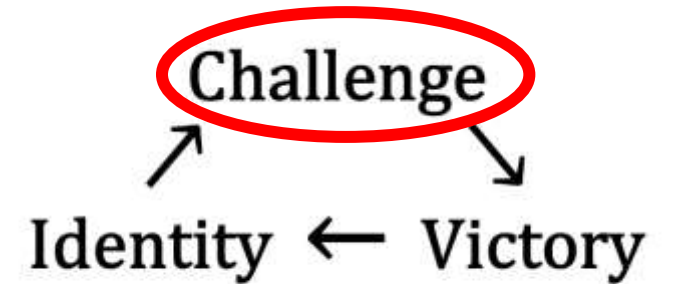
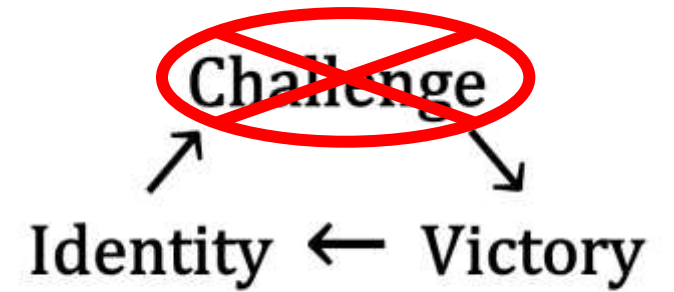
-Katherine Swank, Blackbaud



Identity preface research: People like you



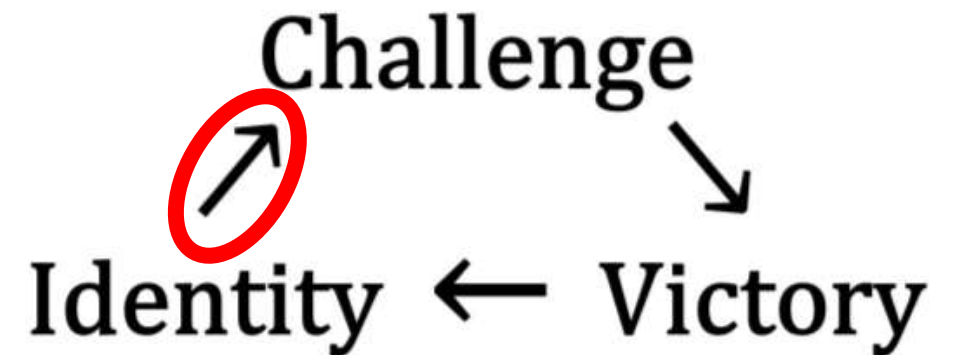
- 4.9% left a gift to charity without being asked.
- 10.8% did so when asked “Would you like to leave any money to charity in your will?”
- 15.4% did so when the ask began with, “many of our customers like to leave money to charity in their will...”



Identity preface research: People like you

People read the story of Sara who had made a planned gift.

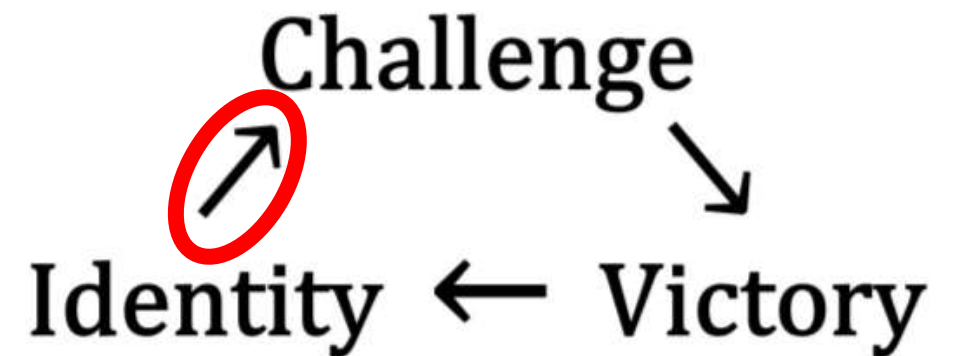
The effect of this story on their interest in making the gift depended on their response to one question, “How much do you identify with Sara? She is [a lot / somewhat / a little bit / not really / not at all] like me.”



Identity preface research: Your life story

In a test of 24 bequest gift descriptions among nearly 10,000 participants, the best was:

“Make a gift to charity in your will to support causes that have been important in your life.”

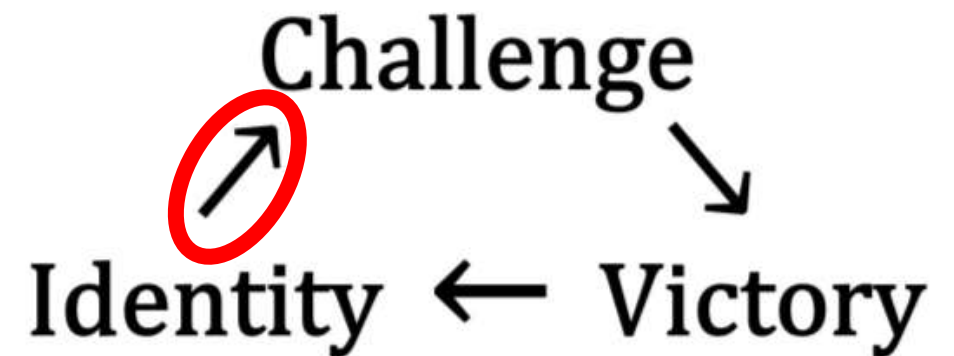


Identity preface research: Your life story

“Many people like to leave a gift to charity in their will.”

worked better as,

“Many people like to leave a gift to charity in their will because they care about causes that are important in their lives.”



Identity preface research: Your life story

The donor's life story arises in

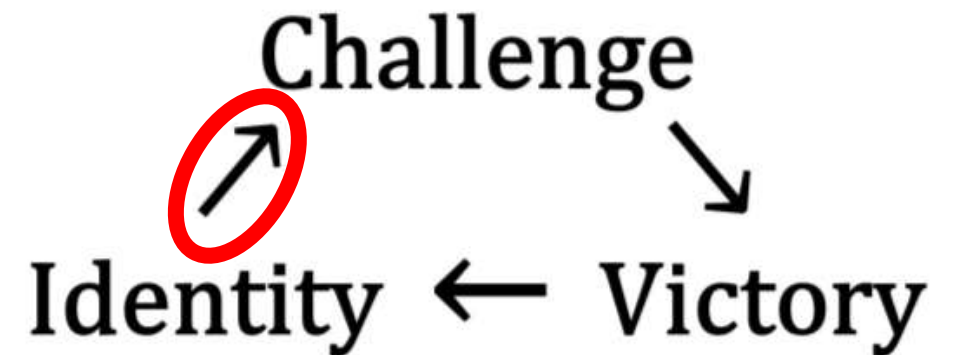
- Qualitative interview research (“When discussing which charities they had chosen to remember, there was a clear link with the life narratives of many respondents.”)
- Neuroimaging research (charitable bequest decisions engage “visualized autobiography” brain regions)



Identity preface research: Your people (family tribute)

One experiment dramatically increased charitable bequest intention by,

1. Ask if there was a “friend or family member who would have appreciated (or would appreciate) your support of [Cause] such as [Org]”
2. Ask about that person’s connection to the cause
3. Ask about a bequest gift “honoring a deceased [or living] friend or family member”



Identity preface: Your people (family tribute)

“Some of the people with whom I meet are interested in hearing about ways to honor and memorialize their loved ones. Would you like to hear more about this option?”

-Alexandra Brovey (Stoney Brook U)
& Patricia Roenigk (Penn State U)

YES, I want to leave a personal legacy in the fight against cancer and other serious illnesses.

I have already included City of Hope in my will, as a beneficiary of a retirement account or other plans.

I wish to remain anonymous.

My gift is in honor of memory of _____

Relationship: _____

I have included NIF in my will or trust, as a beneficiary of a retirement account or other planned gift.

My gift is in honor of memory of:

Relationship: _____

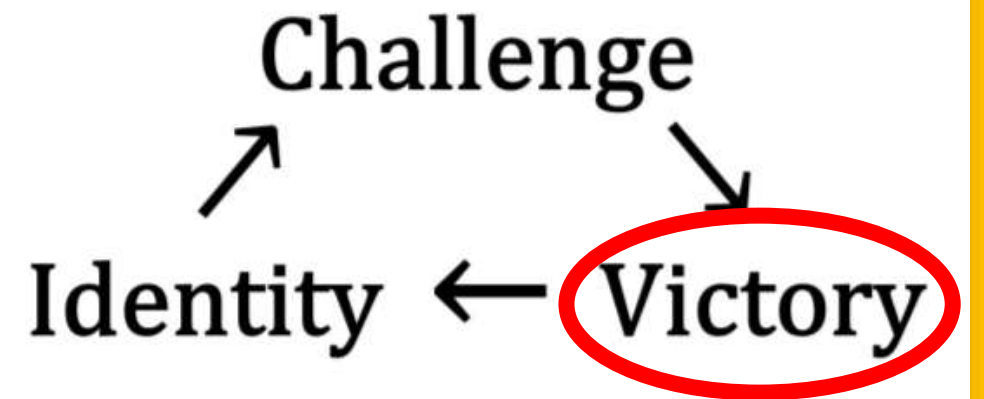
I wish to remain anonymous.



Victory preface research: permanence

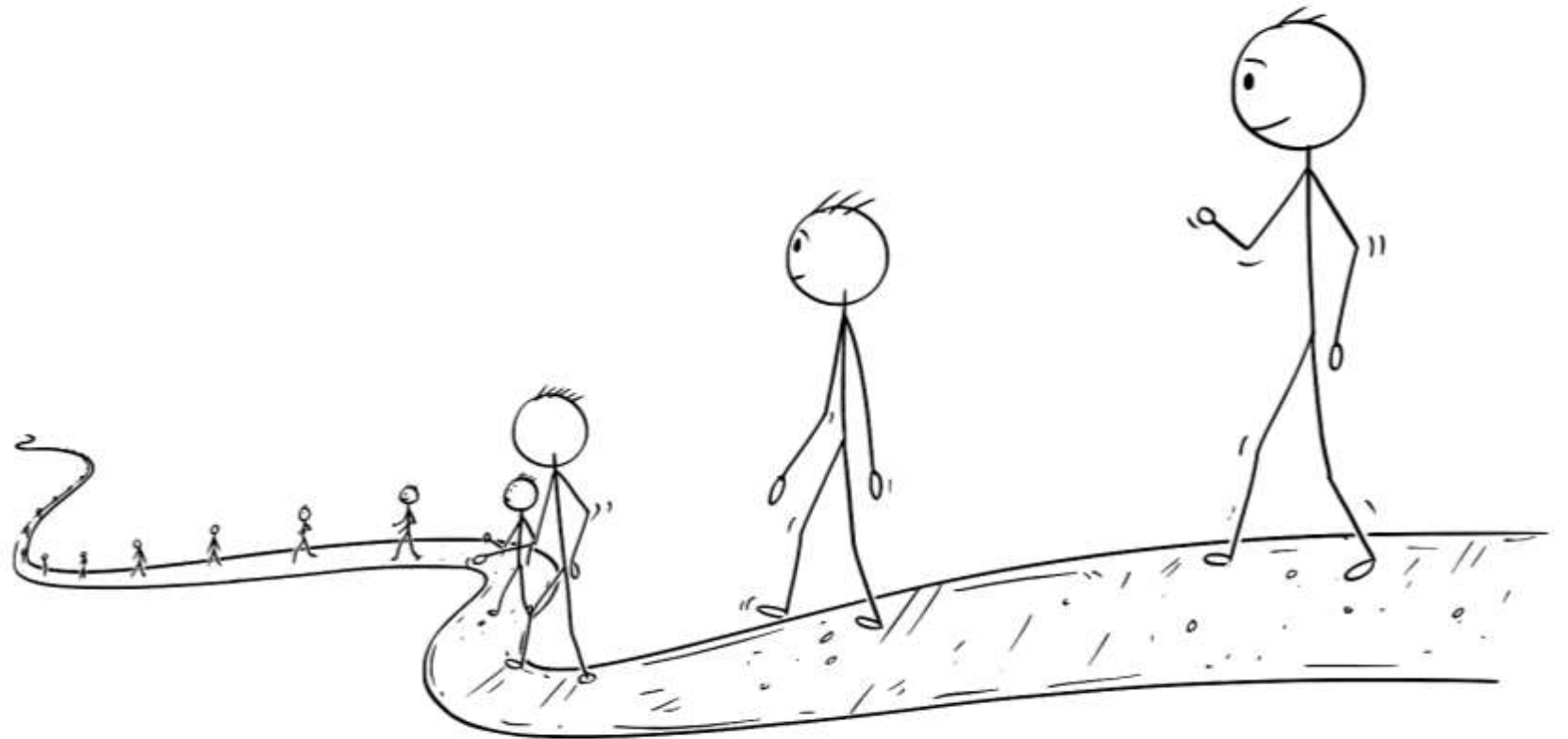
“Victory” describes a visualizable, personally meaningful outcome.

Death reminds donors they’re going to disappear. Legacy giving helps if it provides a way in which the donor’s identity – their people, values, or story – can live on.



Drs. Claire Routley and Adrian Sargeant explain, “The choice of charity to receive a bequest gift could, therefore, be a way of extending one’s autobiography, and thus a sense of self, forward in time beyond one’s physical death.”

Victory preface research: permanence





permanent

temporary

Victory preface research: permanence

In one experiment, a poverty relief charity was described as either,

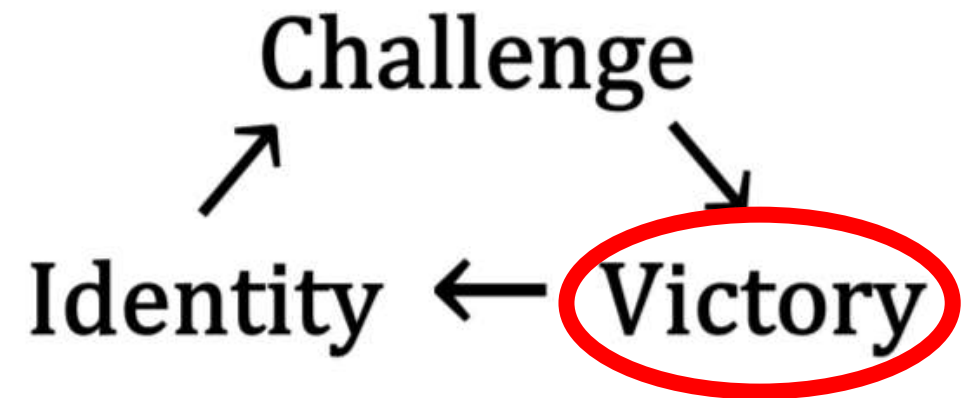
- “meeting the immediate needs of people,” or
- “creating lasting improvements that would benefit people in the future”

Normally, the first description generated more gifts but for people reminded of their mortality, the results reversed.

Victory preface research: permanence

Those with a preference were 3X more likely to want a permanent fund for bequest gifts than for current gifts.

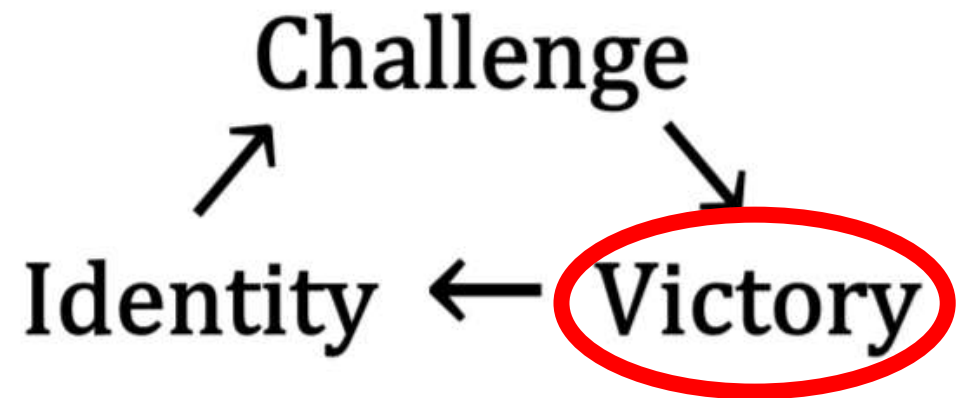
The most powerful motivation to make a second gift in memory of a loved one was the chance to make the fund permanent.



Victory preface examples: permanence

The ultimate “victory” in legacy giving is symbolic immortality. The donor’s identity – his people, values, or story – lives on after death.

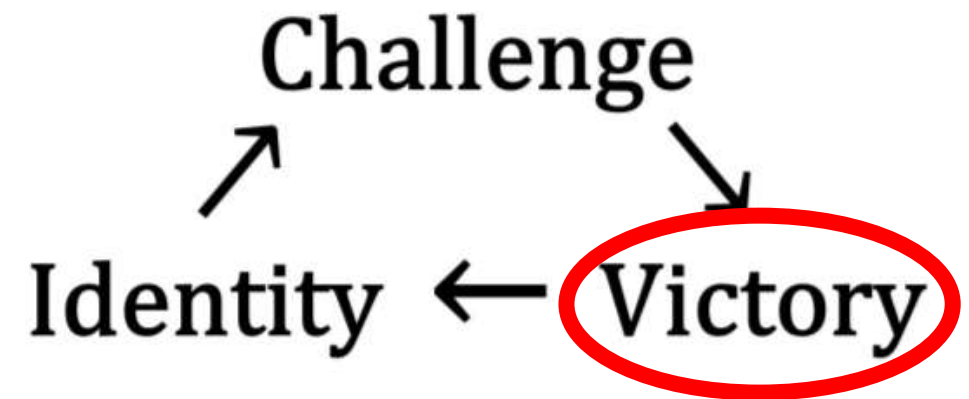
- Permanence language
- Permanence structure: scholarship, lectureship, professorship, endowment funding a favorite part of operations



Victory preface examples: permanence

“Would you consider leaving a legacy of a \$100,000 bequest to ensure that the help you provide these families will continue in perpetuity?”

-Janet Levine & Laurie A. Selik



Victory preface examples: permanence + identity

“You’ve been such a wonderful friend to [the charity] over the years. Many people like you want to include a gift in their will. My job is to help them plan that out, so their gift will make a lasting impact. Do you mind if I share some options with you?”

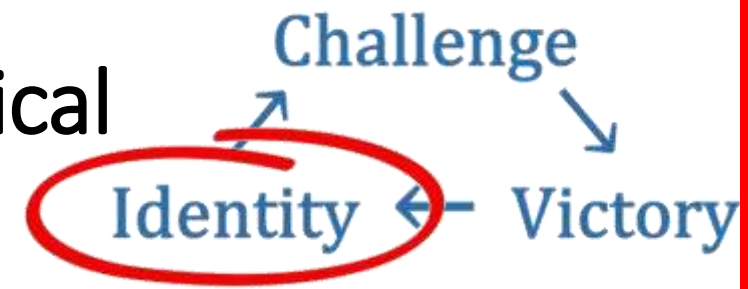


Victory preface examples: permanence + identity

“Look, Bob, you’ve given to us for 8 years now. You’ve given over \$300,000. That’s fantastic! I’m here to build [this charity] for the long run and you’re building that with us. Have you thought about having [this charity] as part of your legacy plan?””



Take a moment to construct your own example estate giving ask that connects with a hypothetical donor's identity (people, values, or life story)



“Look, Bob, you’ve given to us for 8 years now. You’ve given over \$300,000. That’s fantastic! I’m here to build [this charity] for the long run and you’re building that with us. Have you thought about having [this charity] as part of your legacy plan?”

“Mrs. Jones, you are such a wonderful and loyal donor. Many of our most loyal donors are including Kent State in their estate plans in order to make an impact beyond their lifetime. Have you ever considered remembering Kent State in your will?”

“Thank you so much for all your support for so many years – we truly appreciate it. Donors like you who have supported us for so long often include a gift in their estate plans. I’d love to say thank you for that as well if you’ve done so. Have you included us? Have you considered it?”

Victory preface research: Define a victory



Large estate gifts come with instructions.

This is nothing new. In the 1800s, charitable bequests were restricted in,

- 14% of small cash gifts
- 58% of real estate or large cash gifts
- 70% of gifts of a share of the entire estate

Victory preface research: Define a victory



Large gifts produce a specific, usually lasting, impact that motivates the gift SIZE.

These extreme gifts dominate. Most charitable decedents (60%) leave less than 10% of their estates to charity. This majority – the “normal” donors – transfer only 3.8% of all charitable dollars.

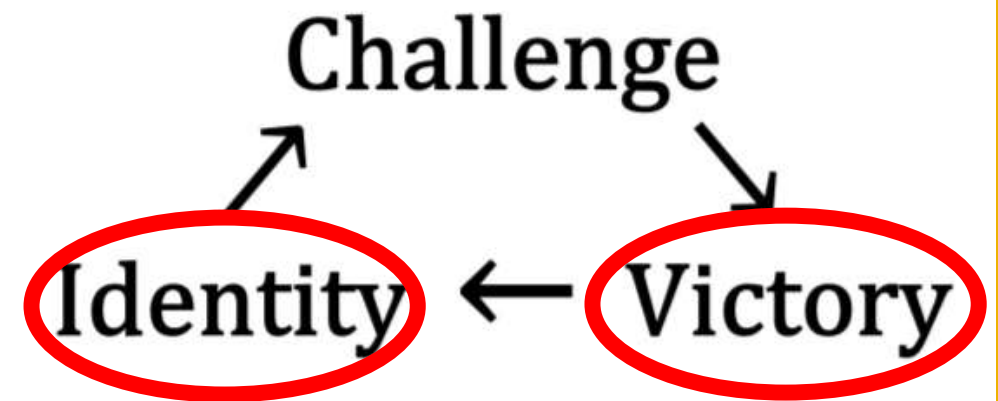
Identity vs. Victory:

Define a victory

The identity preface works to get a bequest gift.

The donor includes the charity because of the donor's people, values, and history.

But it doesn't give a reason for making a gift of a specific SIZE.

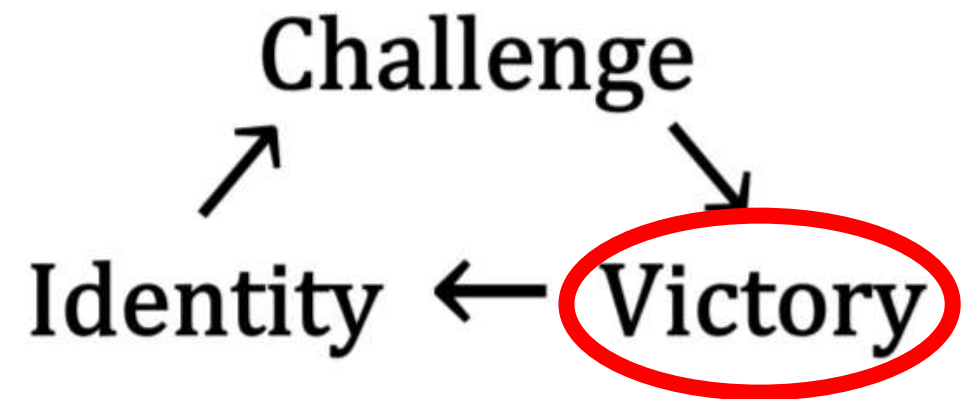


Victory preface examples:

Define a victory

“Tell me, ‘What you would like to accomplish with your gift?’”

“Have you ever thought about how you would like your gift to be used?”

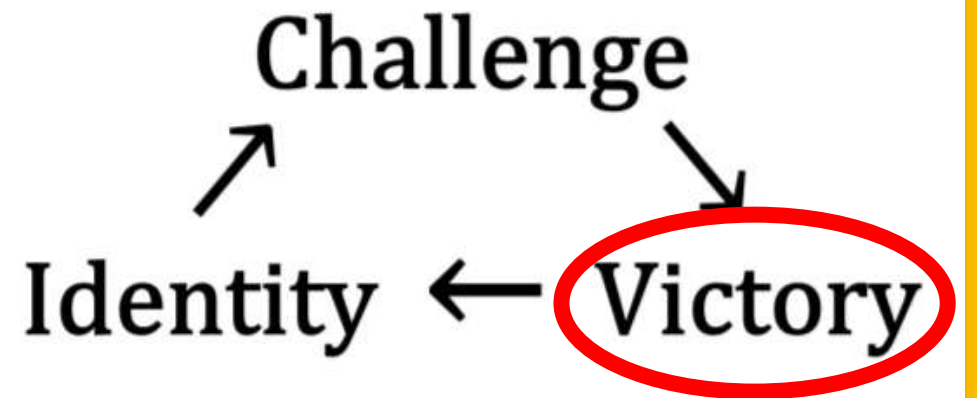


Define a victory by sharing a story

“The reason I ask is this. I was working with another donor; you remind me of him. You both have a real heart for this cause.” *[Identity]*

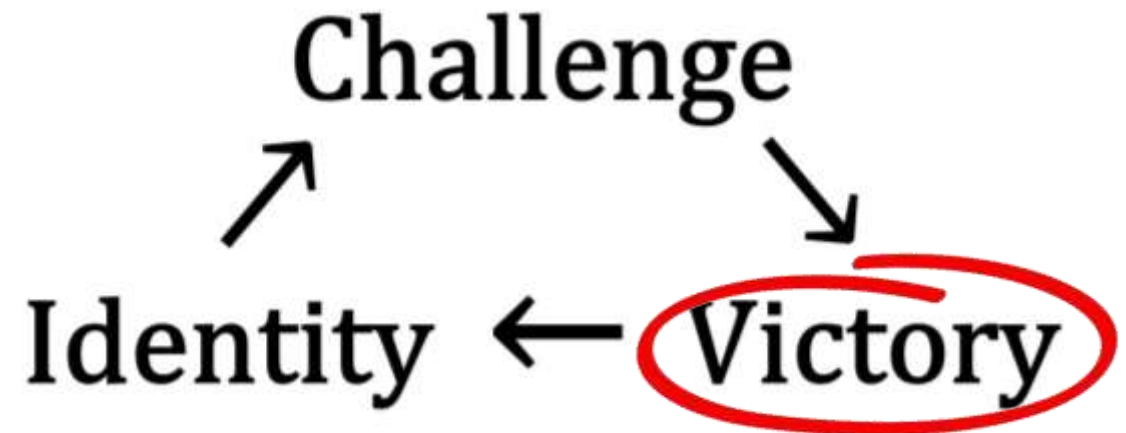
“He decided to create a permanent endowment for a scholarship / lectureship / professorship / our ___ operations. It will ... [describe the impact].” *[Victory]*

“This will come from a \$___ gift in his will. Would that type of gift appeal to you?” *[Challenge]*



The motivation to move from a token estate gift to a large estate gift often comes from the possibility to create a meaningful, lasting victory

What question or approach might you use to help a donor uncover or construct a personally meaningful victory?



Victory preface: External competition

The most powerful permanent expression of identity is the private family foundation

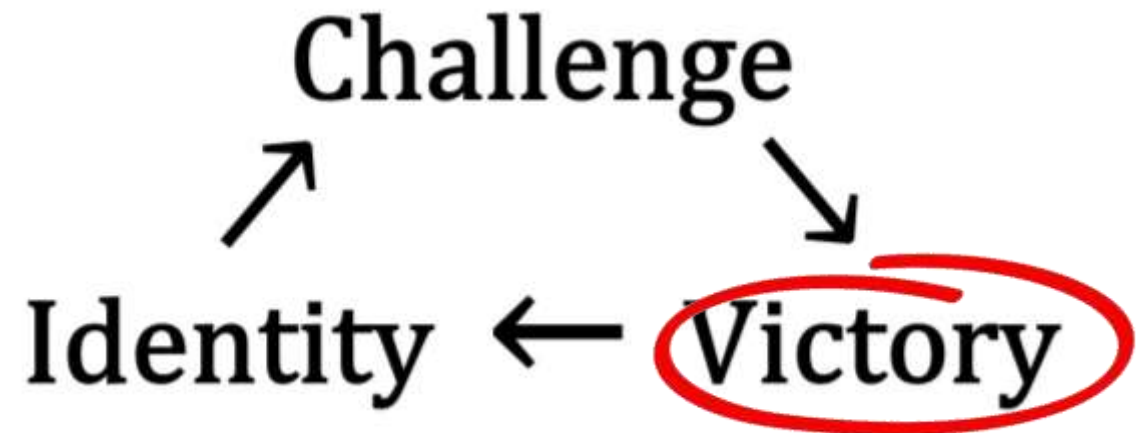
- Lives forever
- Follows the donor's values and rules forever
- Named for the donor or donor's family

For estates over \$5 million, 78% of charitable bequest dollars go to private family foundations



The motivation to move from a token estate gift to a large estate gift often comes from the possibility to create a meaningful, lasting victory

What giving opportunities
- products, designations,
or just impact descriptions
(perhaps at your
organization) - might be
particularly attractive for
some estate donors? At
\$100K? At \$10MM?



“Deliver value to legacy donors? No, no, no. The donor’s job is to deliver value to us! Besides, that just turns unrestricted money into restricted!”



Victory preface:
Internal barriers
Charities are losing to
private family
foundations.
Many aren't offering
any victory, much less
a permanent one.

Overcoming internal barriers: Point to the competition

“The donor wants to put these instructions with their money. They can use a private family foundation or community foundation. But I would rather they gave it directly to us to manage. What do you think?”



Overcoming internal barriers: “Risk management”

“I ask legacy donors what they want to accomplish with their gift. That way I can learn if they’re going to put any instructions in their wills. Sometimes those instructions are a problem. If we don’t learn about it until after they die, we might have to reject the gift. We just lose that money. But if we can talk about their plans in advance, then we can agree on some feasible option”



Original Identity → Challenge → Victory → Enhanced Identity

1. Avoidance
2. Symbolic Immortality



There isn't just one magic phrase or magic story

Instead, there are unlimited expressions of the magic ideas



Still nervous?

Let me end with the
easiest, softest - but
still highly effective -
approach

Three stories and shut up

4 S

1. Story
2. Story
3. Story
4. Shut up

Concept from
Jeff Comfort,
Oregon State University

So, what's new at Texas Tech?

1. ... new coach ...
2. ... new building ...
3. Oh, and Jon Smith did a neat thing. Did you know Jon? He graduated two years before you... No? Well, Jon spent his career helping other people get their finances in order and he recently signed a new will that one day will endow a permanent scholarship for our financial planning students.
4. [Silence]



Three stories and shut up

4 S

- 1. Story
- 2. Story
- 3. Story
- 4. Shut up

Silence as the softest ask – donor decides where the conversation goes

So, what's new at Texas Tech?

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4. [Silence]

Using social "story" words not formal words

AVOIDANCE: Don't lead with death

Story: Character

Identification with the hero. "People like me do things like this"

life story connects with gift in a will

norming the gift

impact on our in-group

SYMBOLIC IMMORTALITY: lasting impact

4 S

1. Story
2. Story
3. Story
4. Shut up

Build your own! The story doesn't have to be your donor experience, or even a donor to your organization. "You remind me of another donor, you both ..."

3. Oh, and Jon Smith did a neat thing. Did you know Jon? He graduated two years before you... No? Well, Jon spent his career helping other people get their finances in order and he recently signed a new will that one day will endow a permanent scholarship for our financial planning students.

Story: Character

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Silence as the softest ask – donor decides where the conversation goes

4. [Silence]

SYMBOLIC IMMORTALITY: lasting impact

Last Will
and Testament



Placeholder text for the will document.



Socratic Fundraising “LEGACY EDITION”

For free links to all my slides, videos, papers, books, please connect on LinkedIn!

How to ask for a gift in a will without fear or anxiety