QUAD CITY
PLANNED GIVING
COUNCIL

HOW TO TALK WITH YOUR DONORS ABOUT **PLANNED GIFTS**

Planned Giving. Estate Planning. Legacy Giving.

These three phrases often cause nonprofit professionals to feel anxious and ill prepared, but they shouldn't. Regardless of your training, basic planned giving concepts are easy to understand. While there are many planned giving vehicles, often you will be talking to donors about making a bequest through their will or beneficiary designation through their retirement plan, IRA or life insurance policy.

Conversations centered around planned giving need not feel scary or intimidating. The relationship you have built with donors over time has prepared both of you to talk about continuing their current support after their lifetime. After thoughtful conversation donors will find great comfort in knowing that the programs they supported during their lifetime will continue to thrive because of their support after their lifetime.

What inspires donors?

We have found the best and easiest way to begin is to explore what the individual is passionate about. Below are a few questions that can be used to start the conversation:

- What is it about our organization that inspires you to be involved and support us?
- What do you admire most about our organization?
- Tell me about the gift that you made to our organization which you are most proud of.

How do they want to be remembered?

Once you understand their inspiration, you can begin to explore how they want to be remembered after their lifetime and the legacy they want to leave behind. Below are a few questions that can help move the conversation forward.

- What kind of impact do you want to have on our organization long-term?
- How do you want to be remembered after your lifetime?

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continued

Finally, you are now ready to start talking about how your donor can have an impact on your organization after their lifetime. Below are a few questions/conversation starters that will allow you to talk about how they can act and make their dreams, and your organization's mission, a reality.

- You have done so much good for us over your lifetime, if there was a way you could continue to support us after your lifetime, would you consider it?
- Would you consider a gift to us when you know you'll no longer need the money yourself?
- Do you have a will?
- Have you included a charity as a beneficiary?
- Would you consider putting us in your will or including us as a beneficiary of your retirement plan?

The members of the Quad City Planned Giving Council are here as a resource for you and your organization. We are made up of local nonprofit and estate planning professionals.

If you have questions or would like to bounce ideas off of someone as you prepare for a planned giving conversation, you can find a list of our board members and their contact information on our website: **qccommunityfoundation.org/qcplannedgivingcouncil**