



# **20 great places for narrative in your planned giving program**

**Leah Eustace, CFRE  
CAGP Annual National  
Conference 2012**

# What is narrative?


from  
1. a story or series of events, especially if connected by time  
2. the account told of a literary work, for example  
3. the plot or sequence of events in a play  
4. a representation of human experience or  
activity, especially if seen in terms of



**nar•ra•tive**

**[nar-uh-tiv]**

**noun**

- 1. a spoken or written account of connected events; a story**
  - 2. the narrated part of a literary work, as distinct from dialogue**
  - 3. the practice or art of telling stories**
  - 4. a representation of a particular situation or process in such a way as to reflect or conform to an overarching set of aims or values**
- 





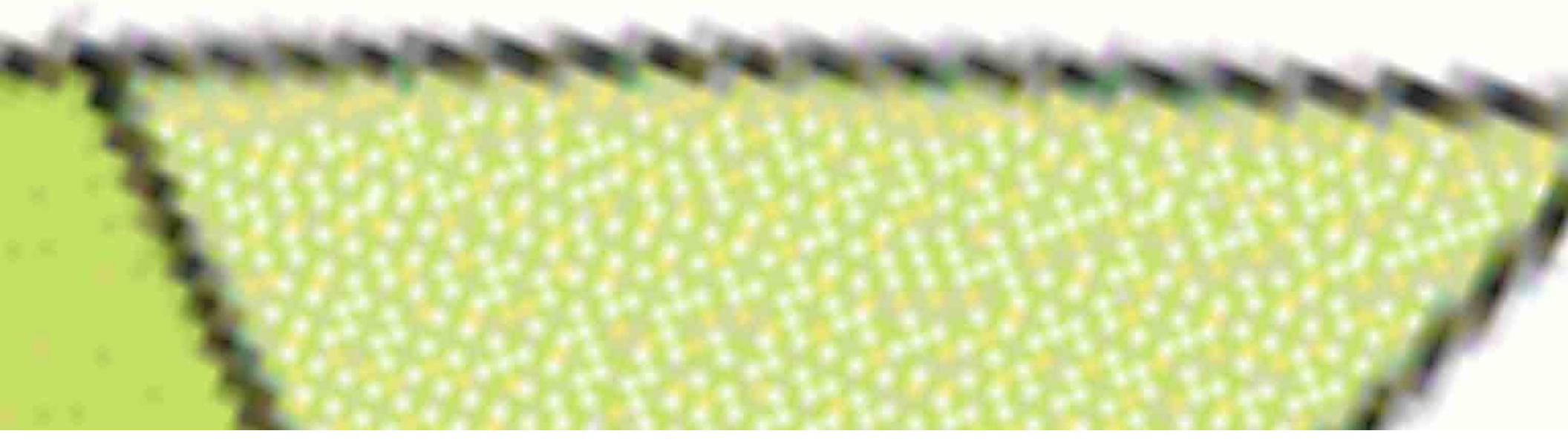




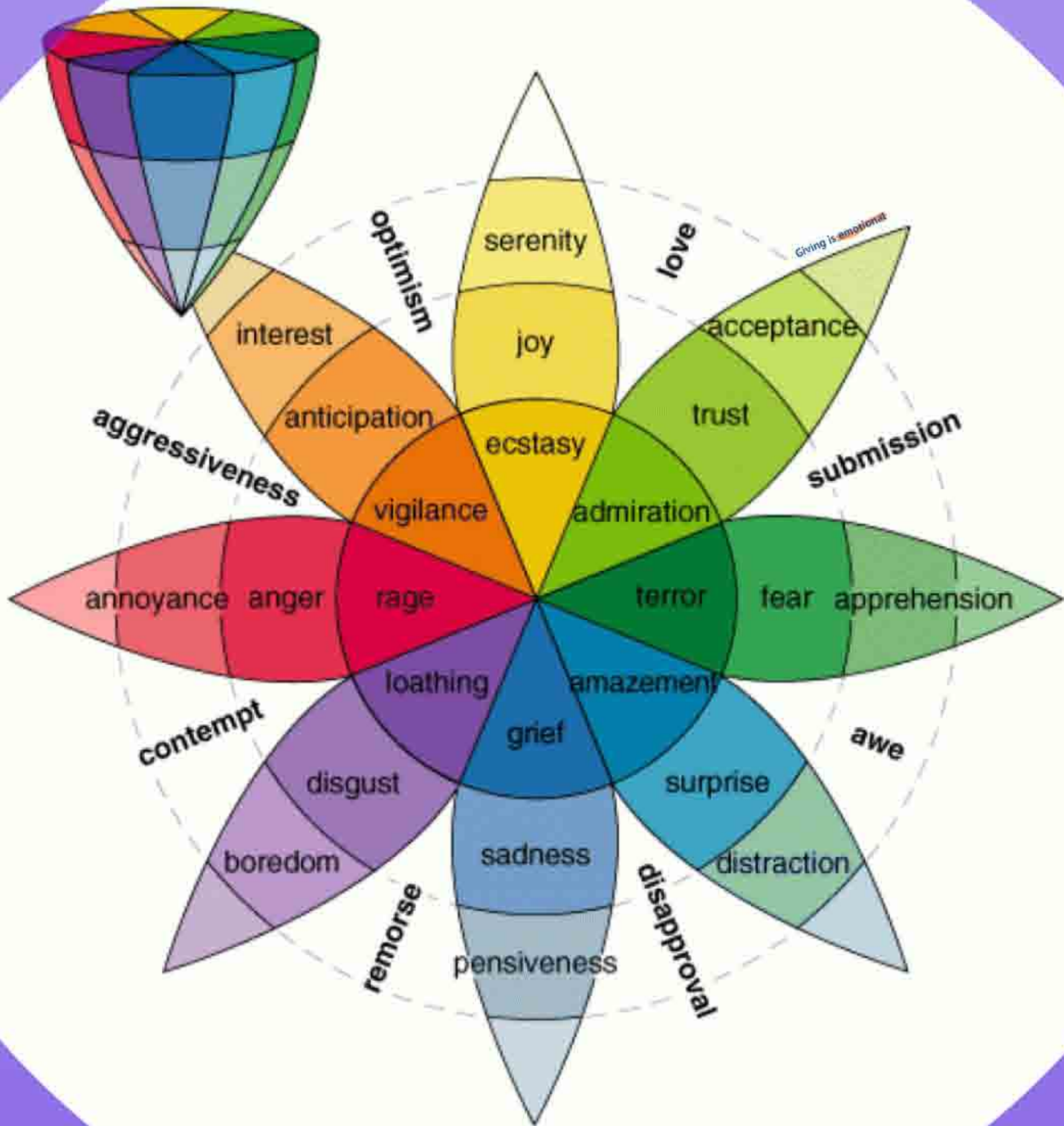
Dwight Carter

**I've learned that people will forget  
what you said, people will forget what  
you did, but people will never forget  
how you made them feel.**

**Giving is emotional**







How do you use narrative  
in your planned giving  
program?



**1. In a letter**



2. In a thank you





**2. In a thank you**

**AMPEX**

Public Relations **AV&I**  
Charles Egan

101 Third Avenue - 17th Fl. - 10003  
New York, New York 10003  
NY 212 512-2000 FAX NY 212 512-4100

**WD&N**

**Clara E. Rosen Schweigman**  
Director of Development



AMPEX Public Relations Group Inc.  
WD&N Charles Egan  
101 Third Avenue - 17th Fl. - 10003  
New York, New York 10003

**WD&N**

*Ms. Rebecca Brown  
2 Linderoth Court  
1097 Sycamore Ave.  
Walace, Calif. 90291*

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c/o Richard Brown  
1047 Superba Avenue  
Venice  
California 90291

20 July 1994

Dear Friends

I miss you.

I used to live in Fort Wayne. I must tell you how much I enjoy your station, and how much I miss it now - not just because my eyesight isn't what it was so I spend most of the day listening to the radio, but because I'm stuck out here with my son and his wife and will be for the next few months at least, until my husband's estate is settled.

Please send me some information about your work, if you have any.

I can only send you a small donation at present, although I have given some in the past. When the estate is settled I may be able to send more.

Yours truly

*RBrown*

Rebecca Brown

**3. On your website**



# AICR

CANCER KNOWS NO BOUNDARIES  
FORTUNATELY, NEITHER DO WE



ASSOCIATION FOR INTERNATIONAL CANCER RESEARCH

SEARCH

GO >

HOME ABOUT AICR **HELPING US** CANCER INFORMATION SUCCESS STORIES RESEARCH NEWS



The Association for International Cancer Research funds projects all over the world. A donation from you, today, will contribute to further research into conquering cancer.



## Helping Us

How Your Money Helps

Make a Donation ▶

Ways to Donate ▶

Fundraising ▶

Interact with AICR ▶

Campaigns & Appeals

The Last Word ▶

Bowel Cancer Appeal

Prostate Cancer Appeal ▶

Corporate Partnerships ▶

## Inspiring Stories Book

Hot baths,  
long walks and  
chamomile tea

Inspiring stories of life, death  
and coping with cancer



Be inspired by heartbreaking stories, funny stories, hopeful stories - amazing stories.



Download your copy of 'Hot baths, long walks and chamomile tea' [here](#).

Laugh. Cry. Be inspired.

Be inspired by true stories capturing people's personal experiences of cancer.



**4. In your  
newsletter**

# Families in Gaza Struggle to Survive

Al Masawat, Gaza Strip

**L**ife has never been easy for the 8,000 people of Al Masawat, an isolated strip of small tents, shanty houses and modest compounds near the Mediterranean Sea. According to the UN, since the 1970s, Israeli settlements and military checkpoints have restricted residents' access to the sea (and their ability to fish) in the west, and to schools and jobs in the east.

Today, despite the withdrawal of Israeli forces last summer, residents say things haven't improved. The Egyptian government has not paid public workers in Gaza since January and Israeli border closures are blocking exports from Gaza's most fertile agricultural region. As a result, the economy is spiraling rapidly downward.

"Life is so difficult now," says Najwa, whose husband can only find sporadic part-time work picking potatoes in nearby fields for about \$1-10 an hour. "There are no jobs. There is nothing for us."

Mercy Corps is committed to helping Gaza's families persevere through this latest crisis. We are providing staple food supplies — including sacks of flour and sugar and large bottles of vegetable oil — to 200 families in Al Masawat, including Najwa's family. Our relief and job program would provide



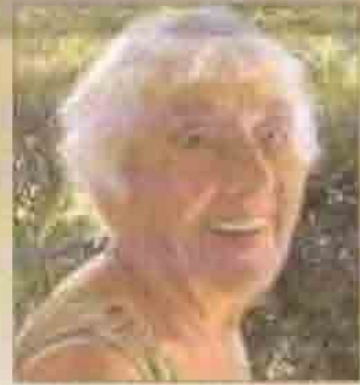
Mercy Corps is delivering food aid to Najwa Abu Ali's family and hundreds of other needy families in Gaza.

employment to members of the most vulnerable families.

Like other Gazans, Najwa remains remarkably hopeful. "God willing, the economic situation will get better, and my husband will find a job for the family."



## A Legacy of Compassion



**T**hroughout her long life, Clara W. Berber reached from her home in Denver, after two recent months of age 94, old commitment to peace — the 1960s, thousands of lives lost in the conflict in Sudan.

Deeply affected by the horrors she witnessed during World War II, Clara came to the United States as a widow in the 1940s. She settled in New York and went to work as a foreign-governance and coordinator in several countries. Clara continued this work until she was in her 70s.

As her days drew to a close, Clara had a long time ahead that she wanted her life savings to go to help families displaced by the violence in Darfur. She decided to leave a large portion of her savings to Mercy Corps to help ease the suffering of men, women and children in this region.

After a life of caring service, Clara's compassion lives on in Darfur where the generosity is making a tangible difference in the lives of families who have lost so much ... their homes ... their livelihoods ... their loved ones.

Please consider including Mercy Corps in your estate plans. To receive personalized information about making a bequest or purchasing a charitable gift annuity, please contact Jennie Peabody at 1-800-292-3355, ext. 428, or at [jpeabody@mercycorps.org](mailto:jpeabody@mercycorps.org).

## **5. Through donor recognition**



Thank you

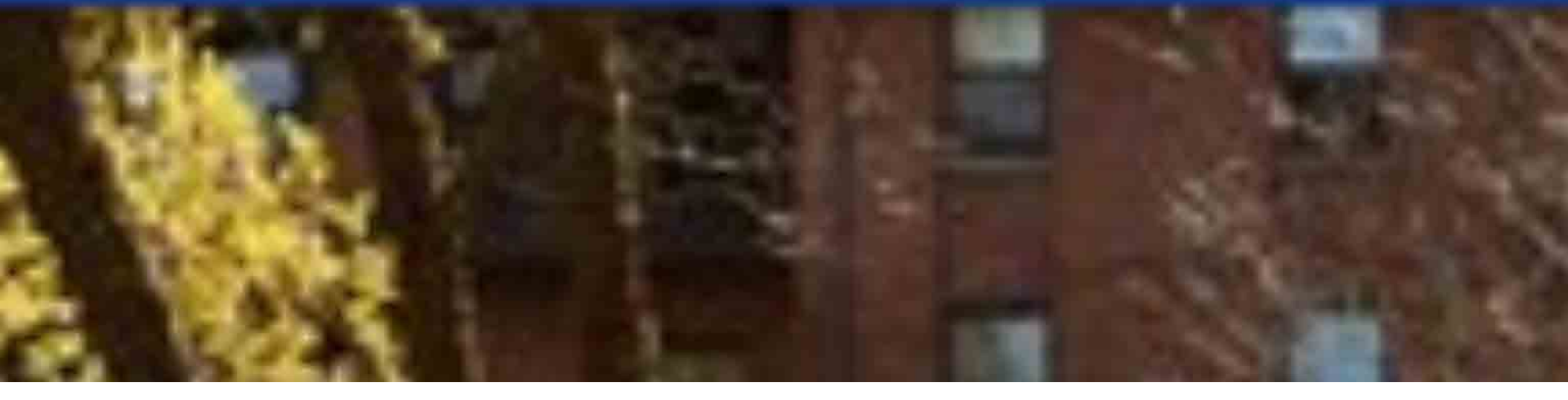
for all  
you did on me for  
me and all the  
other children

# 6. At events

the children's hospital at Westmead



# 7. On Facebook







### PLU Heritage Society

273 likes · 7 talking about this

Like Message

#### Education

Follow us on Facebook and receive news and information on charitable and estate planning from the Gift Planning team at Pacific Lutheran University!

About



Photos

273

Likes

Create a Page

#### GIVEAWAY

I'm giving away 4 tickets to the Social Media Success Summit. If you already have a ticket I'll reimburse you. Best of luck!

Like Elaine Lindsay likes this.

#### All For Nothing?



Watch "All For Nothing?" Tuesdays at 1PM & 10PM on W Network & check out our page for budget-friendly design & real estate tips!

Like Andrea Bartunek Tomlinson likes this.

#### Now

March

2012

2013

2014

Founded

Jim Anderson updated the description of the group APPeeps. This is the #APPeeps "nest." Fly Away and drop in occasionally. This group is comprised of the original 2012 #APPeeps drafted by Nick Ricci.

Clare McDowall changed her profile picture.

Mark Hierlihy read The meaning of 9/11's most controversial... on The Guardian.

Jim Anderson added photos to #AFPMeet 2012 in APPeeps.

Diane Pascoli

Glenn McInnes

Jennifer Porteous Eustace

John W. Dawe

Kimberley MacKenzie

Mark Hierlihy

Rachael Wilson

Robin Butler

Sam Loucks Laprade

HOME ONLINE FRIENDS (4)

Jeff Gignac

Search



Post Photo

Write something...

PLU Heritage Society shared a link. Tuesday

#### Recent Posts by Others on PLU Heritage Society

See All



Doug Page

Welcome to PLU's new President Thomas K. Krise. https://... February 29 at 10:16pm



Maria Cristina

Ever so proud of my Alma Mater! February 10 at 11:16pm

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**8. On a beer mat.. wait, what?**



**WHEN YOU COME BACK  
AS A WHALE YOU'LL  
BE BLOODY GLAD  
YOU PUT GREENPEACE  
IN YOUR WILL.**

**☎ 1800 81 51 51**





If you die without leaving a will, the state will distribute your property according to its laws, not your wishes.

Clearly, having a will is vital. That's why **GREENPEACE** has published a clear, concise guide on the subject. We can help you ensure your money goes to the people you love and the organisations you believe in.

For your free copy, **simply call 1 800 81 51 51,**  
or write to, Greenpeace Australia,  
PO Box 800, Surry Hills NSW 2010

**9. (and a billboard)**



WHEN YOU COME BACK AS A WHALE  
YOU'LL BE BLOODY GLAD YOU  
HATE GREENPEACE IN YOUR HILL.

008 81 51 51

Sydney '94

**10. In an ad**

*Pet groomer Jenny Baxter died in 1972.*

*Adopt-a-Pet*

*At 5 p.m. today, she'll feed 50 stray dogs.*

*Jenny would have done her job for you.*

*She loved caring for animals and was forever rescuing strays.*

*More animals will be saved because Jenny included a bequest to the local shelter in her will. Thanks to Jenny, tails are still wagging. Include your favorite cause in your will or estate plan. Contact a charitable organization, attorney, financial advisor or local LEAVE A LEGACY® program to learn how.*

**11. On a website (again, I know)**

# The Nature Conservancy



Protecting nature. Preserving life.™

The mission of The Nature Conservancy is to preserve the plants, animals and natural communities that represent the diversity of life on Earth by protecting the lands and waters they need to survive.

[Home](#) [About Us](#) [Where We Work](#) [Our Initiatives](#) [News Room](#) [Blog](#) [My Nature Page](#)

Search nature.org



## Gift & Estate Planning

[Gift & Estate Planning](#)  
[Our Donors' Stories](#)  
[The Legacy Club](#)  
[Legal Language & Tax ID](#)

## Explore

[Legacy Planner](#)  
[Real Estate Gift Guide](#)  
[Goals & Benefits](#)  
[Giving Wisely](#)

## Research

[Types of Gifts](#)

## Celebrating Nature

This Earth Day, learn how our donors support nature!

[Read Their Stories](#)



THE  
LEGACY  
CLUB  
*stories of hope*

Celebrating  
Nature

A Gift for You  
and Nature

Planning for  
the Future

We Know  
Real Estate

## Gift & Estate Planning

Discover Ways to Give & Save

myRealEstate



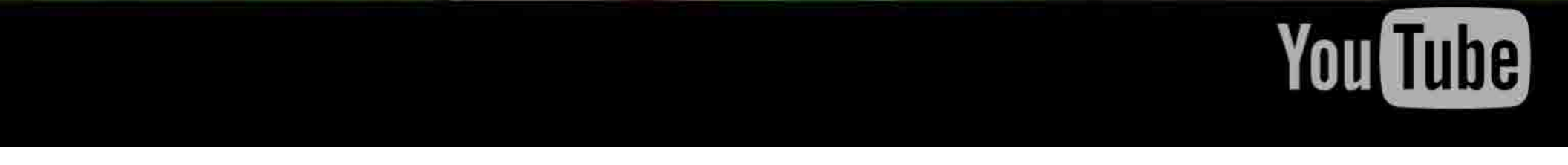
Gift Guide



**12. In a video**

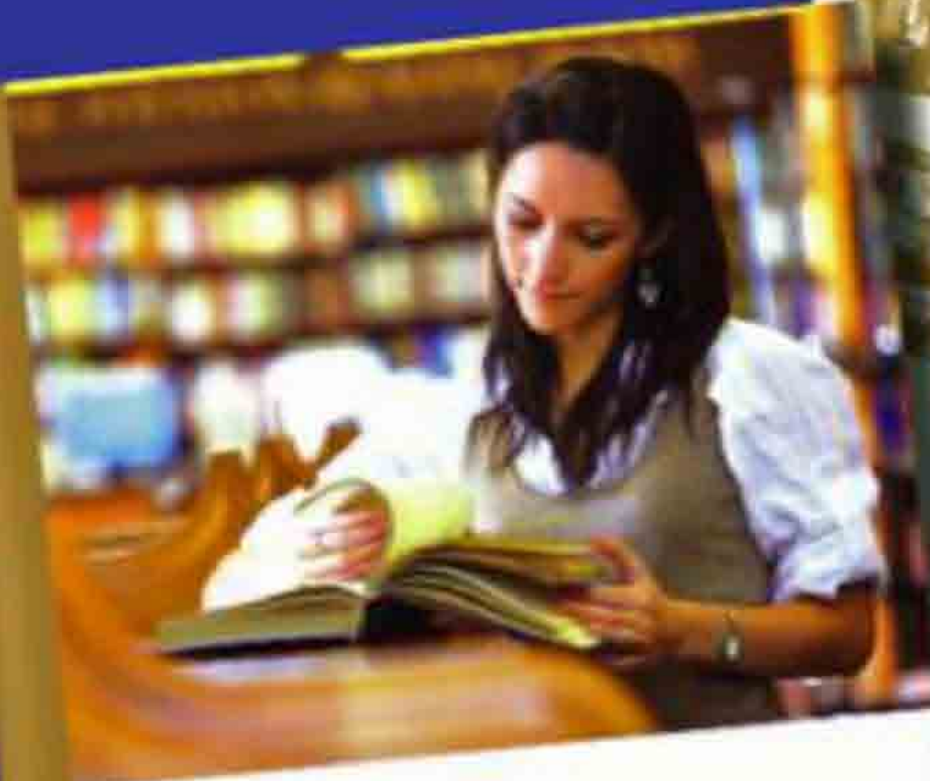


Her mum



**13. In a brochure**





Who will help me...  
to make the breakthroughs...  
explore the unknown...  
communicate insights...  
...and fly higher than  
I thought was possible?

I will  
Leaving a gift in your will  
to the University of Oxford



**Medical Sciences**  
The University of Oxford is a leading institution in the field of medical research and education. Our world-class faculty and state-of-the-art facilities provide an exceptional environment for research and learning. We offer a wide range of courses and research opportunities in the field of medical sciences.

**The options for the future**  
If you want a challenging career, look no further than the University of Oxford. Our world-class faculty and state-of-the-art facilities provide an exceptional environment for research and learning. We offer a wide range of courses and research opportunities in the field of medical sciences.

**Our world-class faculty**  
The University of Oxford is a leading institution in the field of medical research and education. Our world-class faculty and state-of-the-art facilities provide an exceptional environment for research and learning. We offer a wide range of courses and research opportunities in the field of medical sciences.

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**Our world-class research**  
The University of Oxford is a leading institution in the field of medical research and education. Our world-class faculty and state-of-the-art facilities provide an exceptional environment for research and learning. We offer a wide range of courses and research opportunities in the field of medical sciences.

[www.oxford.ac.uk](http://www.oxford.ac.uk)



**14. In the newspaper**



Meet Sarah, Age 7.  
**Aspiring  
Veterinarian**



**Help make Sarah's dreams a reality with your lasting legacy gift.**

You can have a profound influence on future students of Colorado State University. Whether prospective veterinarians, chemists, social researchers, or engineers, CSU scholars benefit from your estate gift.

With the help of CSU's Office of Gift Planning, your legacy of philanthropy can assist generations to come. We're ready to meet with you and your advisors to turn dreams into reality -- and to secure a better future for kids like Sarah.

[www.plannedgiving.colostate.edu](http://www.plannedgiving.colostate.edu)

**Office of Gift Planning**

Marianne Blackwell: (970) 491-7302  
mblackwell@ua.colostate.edu

Bill Sheets: (970) 491-4879  
bsheets@ua.colostate.edu

THE CAMPAIGN FOR  
Colorado State University



**15. On a buckslip**

## 15. On a Ducktip



**DID YOU KNOW?** Over 50% of all hospitalized seniors are suffering from malnutrition so severe that it either caused their illness or it prevents them from getting better. **Your contribution today will make a real difference to someone like Vivian.**

*When I was a patient recently the doctor said my main problem was malnutrition. As you can see, I am still very "shaky" and unable to cook. I am so grateful for your meals. Thank you.*

Please send me information on how to remember Senior Services in my will.

*A copy of our most recent annual report may be obtained by writing:  
Senior Services of Snohomish County,  
P.O. Box 86, Mukilteo, WA 98275-9909.*

**16. In your legacy society**



Susan Shipman & Amber  
*Rose Fay Thomas Member since 2011*



16. In your legacy society

# **17. In donor presentations**



# DR. CHARLES AND SARAH DAVOL TEST



A Love Story



Email Favorite Download Embed

Like

Tweet 0

+1 0

Share



PREFACE

"THEY WERE BOTH VERY PLEASANT people," says Kristin Fruehwald, attorney for Dr. Charles Test and his wife, Sarah. "They had very definite philanthropic passions, and they were both committed to them."

Sarah Davol Test died on November 19<sup>th</sup>, 2011, just four days after her husband of 56 years, Dr. Charles E. Test. Two months later, a planned gift made by Dr. and Mrs. Test was received by Central Indiana Community Foundation. According to Fruehwald, it was a very deliberate and purposeful gift, one that reflected the couples' long-held values of giving back to the community they called "home."

CREATING...



...A PLANNED GIFT...

...DOESN'T HAVE TO BE DIFFICULT.  
Let CICF's expert staff help.

Though saddened by their passing, we are proud that Dr. and Mrs. Test entrusted CICF to help them leave the legacy they wanted. We provide these services to families and their legal and financial advisors on a daily basis, and have since The Indianapolis Foundation was created in 1916.

CICF is committed to fulfilling our donors' wishes as they intended, and to ensuring their love, care and compassion is forever remembered as a result.

# 18. On Twitter



www.childrensmn.org

Hospitals:  
Minneapolis  
St. Paul

Clinics:  
Minneapolis  
St. Paul  
Maple Grove  
Minnetonka  
Roseville  
Woodbury



# ChildrensMN

✓ Following



[@greenmill001](#) You've been a great partner for a long time and we appreciate your adding our twibbon. Thanks!

about 2 hours ago from HootSuite

[@paulvp](#) Thanks for adding our twibbon and supporting Children's of MN. Plus the star looks pretty cool and sheriff-like on your avatar

about 2 hours ago from HootSuite

[@rahra\\_owens](#) Thanks so much for adding our twibbon and showing support for Children's of MNI

about 2 hours ago from HootSuite

Update: 80 out of 280 Rooms funded - including ALL 11 pediatric ICU rooms on our St. Paul campus! Learn more at [fillaroomwithcare.org](#)

about 2 hours ago from HootSuite

Miss Rabbi Kushner talking about our integrative

**Name** Children's Minnesota  
**Location** Twin Cities - MN  
**Web** <http://www.childr...>  
**Bio** Serving as Minnesota's children's hospital since 1924

373 following 706 followers 8 listed

Tweets 154

Favorites

Actions

[block ChildrensMN](#)  
[report for spam](#)

Following



[View All...](#)

[RSS feed of ChildrensMN's tweets](#)



**19. On a postcard**

19. On a postcard

**SHANA HARRISON, 2000**

"It is important for me to make a gift in support of my alma mater because no contribution is too small when it comes to helping students reach their potential. Through my gift to Carolina, students have opportunities to pursue college degrees that they might not be able to afford otherwise."

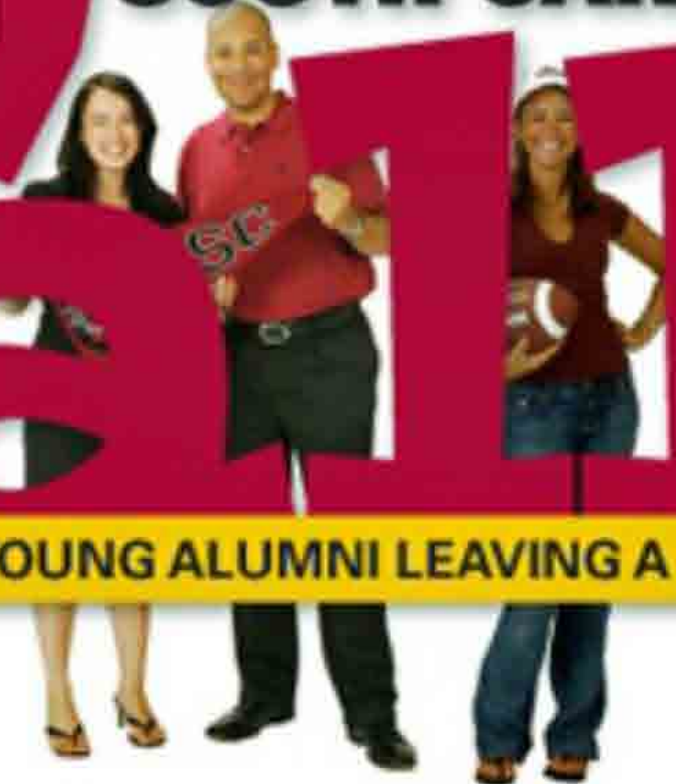
**PRESTON SABALIS, 2000**

"Donations of any size add up to make a world of difference. I try to give as much as I can, knowing that the University has needs and will put my money to good use."

**WE'RE SOUTH CAROLINA**

**YOUTH!**

**YOUNG ALUMNI LEAVING A LEGACY**



## 20. In an 'annual report'





20. In an 'annual report'



*Celebrating*

*Jane Beaumont*

LEGACY DONOR



Why do I feel good about supporting Interval House? Because *Interval House goes beyond providing safe shelter* and has programs like BESS to help women get through difficult times and rebuild productive lives in the community.

Interval House's Legacy Donors will enrich the lives of women and children forever. We extend our deepest thanks to our supporters who have explored their personal legacy and wish to support Interval House forever. What an amazing and inspiring commitment!

PREV

NEXT

MESSAGE

VAL  
HOUSE



# **Thank you!**



**Leah Eustace, CFRE**  
**Principal & Chief Idea Officer**  
**Good Works**  
**Ottawa, Canada**  
**leah@goodworksco.ca**  
**@leaheustace**