



# “Tips & Templates” Working your legacy program

Presentation for  
**CAGP-ACPDP National Conference**  
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Variety – The Children’s Charity of BC

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## Basic Questions

- Does your charity intend to be here 20-30-50 years in the future?
- Does your Board believe that?
- Do you have Board buy-in for a legacy program, even a small, simple, cost-effective one?

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## Basic Questions

Why ask a donor to leave you a legacy, if your organization may not even be here in the future?

(you may be too unorganized, not properly managed, constantly scrambling with other priorities)

Leaving a legacy is the donor’s personal decision. Not yours.

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## Three Types of Legacy or Bequest Programs

- Passive Program
- Active Program
- Proactive Program

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## Passive Program

- You do nothing
- You receive the occasional legacy
- maybe
- You deal with each when they arrive, possibly with a volunteer or Board member with legal or accounting experience

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## Active Program

- one person (only you or you and a volunteer)
- make a legacy brochure
- use your newsletter w/legacy article
  - include a reply coupon
  - Include in every issue (no exceptions)

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## Active Program

- Take ads in seniors' news magazines
- listing in Donor Guides or Charity Directories
- Legacy reminder slip with each tax receipt
- contact a few professional advisors  
(solicitors, attorneys, notaries, CPA's, CAs and CGAs)
- start small - build it as you go
- But, you must start now.

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## Proactive Program

- need at least one dedicated staff
- requires active donor calls and visits
- personalize everything you do
- maintain detailed donor notes with record tracking templates
- remember the Privacy Act and keep what is appropriate.

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## Remember

- There is a long lead time for legacies to come in but you must start now. Every donor call or contact you make now, is money in the bank both now and in the future.
- You will have renewed loyalty, another gift next year, and likely a larger gift.
- Your Board needs to know this.

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# Marketing Materials

- Planned Giving Newsletter



**The Centre Ring**  
Legacy Giving for Variety - The Children's Charity of BC  
October 2016



**Susan Cooper Leads with a Legacy**

It takes a lot of love to raise wonderful babies and give to a charity that will help other children. Susan Cooper, the mother of three young boys, has found a way to give to Variety that will help other children. Susan Cooper leads with a legacy.

During her wedding day she has contributed regularly to Variety through a trust of her husband's estate. She has also made a charitable donation to Variety through a trust of her husband's estate. Susan Cooper leads with a legacy.

The trust was established in 2011 and is a testament to her husband's love for Variety. Susan Cooper leads with a legacy.

For more information, please contact us at 604-681-1111 or visit our website at [www.varietypbc.ca](http://www.varietypbc.ca).



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# Marketing Materials

- Planned Giving Brochure



**about variety**




Variety - The Children's Charity of British Columbia has helped over 100,000 children in need. We are a registered charity and a not-for-profit organization. We are committed to providing support and resources to children in need.

**the centre ring**

The Centre Ring is a program that allows you to make a charitable donation to Variety through a trust of your estate. This is a great way to give to Variety and help other children in need.

**Planned Giving**

For more information, please contact us at 604-681-1111 or visit our website at [www.varietypbc.ca](http://www.varietypbc.ca).



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# Marketing Materials

- Planned Giving Brochure



**your gift of a lifetime**

Supporting BC's children has special meaning for many families. Your gift of a lifetime can help us continue to support children in need.

**a legacy in your will**

Supporting BC's children has special meaning for many families. Your gift of a lifetime can help us continue to support children in need.

**charitable life insurance**

Supporting BC's children has special meaning for many families. Your gift of a lifetime can help us continue to support children in need.

**trusts and endowments**

Supporting BC's children has special meaning for many families. Your gift of a lifetime can help us continue to support children in need.



...inspiring hope, enriching lives, and building a better future for BC's children.



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## Marketing Materials

### Legacy/Bequest Buck slip - Template

#### LEAVE A LEGACY™

Helping children who have special needs now and helping them in the future is how you can make a difference in the lives that will follow. With your help, Variety - The Children's Charity has been helping BC's kids for 40 years. With a gift in your Will, you can help them far into the future.



Variety - The Children's Charity has been helping BC's kids for 40 years. With a gift in your Will, you can help them far into the future.

#### I want to Leave a Legacy to Variety!

Please send me more information about the following:

- Estate Planning, Wills and Executors
- Making a Request to Variety
- Charitable Life Insurance Gifts
- Creating a Trust or Endowment in my name
- I have already made a bequest to Variety in my Will
- Please have someone contact me in confidence

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City/Town: \_\_\_\_\_ Prov: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Tel: \_\_\_\_\_ Email: \_\_\_\_\_

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## Marketing and Materials

### Create a 'Recognition Certificate'



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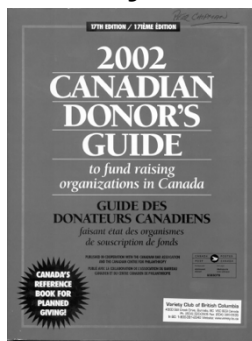
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## Directory Listing



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## Proactive - Overall Strategy

### Tips 1, 2 & 3

(courtesy of Tom Riglar, UWLM)

- plan your work  
(by year, quarter, month, week and day)
- work your plan
- get organized - stay organized

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## Basic Administration

### Tip 4 Use your resources.

- use donor friendly terminology
- use current technology  
(PC with database and time-management applications)
- take software course(s) if necessary
- otherwise use the old way:
  - use tickle file 31/12, written daily diary
  - build hardcopy folders containing estate files, major gift donor info, confirmed bequests

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## Basic Administration

### Estate Summary Sheet - Template

Use a little estate summary sheet attached to the inside, front flap of an estate file folder. It is a quick reference, and very helpful when the auditors come for a visit.

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## Basic Administration

### Donor Preference/Profile Sheet

This is a more detailed form for your larger, confirmed donors, that you can either send to them, or fill out yourself during a chat or visit. Belongs in donor hardcopy file.

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## Basic Administration

### Tip 5 Research old estate files

(go back 10 yrs if files available)

- Who has given to you?
  - male, female, teacher
  - who were the estate lawyers, executors other beneficiaries - are they still around?
- Maybe worth cultivating for the future

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## Basic Administration

### Tip 6 Record Estate names and distribution amounts.

- use info from last 10 years (if available)
- use a spreadsheet program such as Excel (useful for rolling averages and budgeting)

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## Estate Listing

| Estate          | Notified   | Total Estate | Our Portion | Received   | Amount     | Balance    | Remarks                              | Year |
|-----------------|------------|--------------|-------------|------------|------------|------------|--------------------------------------|------|
| Smith, Margaret | Aug 10/99  | 27,500.00    |             |            |            | 27,500.00  | Deloitte & Touche, Vancouver         | 1999 |
| CLOSED          |            |              |             | Aug. 12/99 | 27,500.00  |            | nil                                  |      |
| Smith, Mary     | Feb. 15/00 | 5,000.00     | 500         | Feb. 15/00 | 500.00     |            | contact @ MM, Kamloops               | 2000 |
| CLOSED          | Feb. 15/00 |              |             | Total      | 500.00     |            |                                      |      |
| Smith, Victoria | Jul 30/01  | 800,000.00   | 1/4 residua | Aug 29/01  |            | 100,000.00 | TS, Penticon 250-711-0000            |      |
|                 |            |              |             | Feb 04/02  |            | 127,000.00 | verbal estimate of Variety portion   |      |
|                 |            |              |             | Mar 11/02  | 127,983.24 |            | Rec'd & returning Consent & Releases | 2002 |
|                 |            |              |             | Aug 19/02  | 844.42     |            | 1,000.00 am bid after CRA Release    |      |
|                 |            |              |             | Jan 24/03  | 351.19     |            | Nil Final payment                    | 2002 |
| CLOSED          |            |              |             | Total      | 128,427.85 |            | Nil final, final payment             |      |
| Smith, Derrick  | Jan 16/03  | 550,000.00   | 50%         | late 2003  |            | 250,000.00 | NI, Executrix                        |      |
|                 |            |              |             | Jul 08/03  | 150,000.00 | 80,000.00  |                                      | 2003 |
|                 |            |              |             | Nov 15/03  | 80,000.00  | 3,000.00   | am balance remaining                 | 2004 |
|                 |            |              |             | Sep 15/04  | 2,982.55   | 0.00       | final distribution                   | 2004 |
| CLOSED          |            |              |             | Total      | 242,982.55 |            |                                      |      |

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## Donor Database

Don't have one - start one - and use it!  
 (Use MS Access, Excel, Basic Funder, Raisers Edge or other donor tracking software.)

**Tip 7** Gift history. Check records as far back as you can - to see whether donors are:

- Consistent, consecutive gifts
- Sporadic gifts or
- Loyal at least annually

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## Donor Database

**Tip 8** Start coding donor records for:

- creating lists
- mail merge letters to prospects

CODE EXAMPLES:

- Prospect
- Confirmed
- Estate Current
- Estate Closed

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## Donor Database

### Record Actions / Activity – Template

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## Donor Database

### Record Actions / Activity – Template

| Action Date | Action Type    | Status       | Assigned To | Time |
|-------------|----------------|--------------|-------------|------|
| 1/15/2004   | Phone Call     | Pending      | Jon Stehrer |      |
| 3/15/2004   | Correspondence | Completed    | Jon Stehrer |      |
| 2/15/2004   | Event          | Solicitation | Jon Stehrer |      |
| 2/16/2004   | Event          | Completed    |             |      |
| 11/4/2003   | Event          | Completed    |             |      |
| 2/17/2003   | Event          | Completed    |             |      |
| 3/12/1998   | Phone Call     | Solicitation |             |      |

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## Donor Database

### Activity Report

| Specific Goals 2012           | Goals 2012        | Last Month | YTD        |
|-------------------------------|-------------------|------------|------------|
| Estates/Wills in probate      | What's in probate | 1          | 32         |
| Legacy & Endowment Funds      | \$ 800,000        | 451,820.27 | 509,462.00 |
| Major Gifts                   | 200,000           | 3          | 3          |
| Centre Ring members (new)     | 75                | 18         | 18         |
| Total Centre Ring members     | 500               | 18         | 432        |
| Residual Interest trusts-CRTs | 2                 | 0          | 0          |
| New Endowments                | 2                 | 0          | 0          |
| Insurance policies-in force   | 2                 | 0          | 4          |
| Donor Stewardship calls       | 3,000             | 500        | 500        |
| Donor contacts - (other)      | 1,000             | 100        | 200        |
| Donor visits -                | 25                | 0          | 0          |
| Professional Advisor contacts | 100               | 20         | 26         |
| Donor Events planned          | 5                 | 0          | 0          |

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## Donor Database

**Tip 9** Filter database in search of mature donors and for a quick start.

- search for Miss
- identify British immigrant expatriates
- identify old, English female names of the '30s and 40s'
- these parameters will be different in each country or local demographic

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## Donor Database

**Tip 10** Inform reception and other staff to be on the lookout for legacy and major gift prospects.

- explain legacy giving for all staff having donor contact

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## Please Consider This

- You MUST be a donor yourself
- \$25 or \$2,500, it doesn't matter
- It only counts if you donate yourself
- How can you ask someone else for money or a bequest, if you haven't given yourself?

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## Letters

**Tip 11** Personalize every piece of correspondence.

- sign in blue ink  
(black looks too much like mass photocopying)
- Hand write the address on your envelopes
- Use personal thank you notes

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## Letters

**Tip 12** Create fax / letter templates for notaries, solicitor and donor inquires for sample wording in their Wills.

- respond immediately and directly
- send donor thank you  
(be sure to include the ROI story)
- Do NOT ask for money with a thank you

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## Letters

**Tip 13** Use the LEAVE A LEGACY™ logo.

- can only be used with a CAGP or LAL license agreement
- your charity must become a sponsor of your local LAL program to sign license



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## Letters

### Testimonials – Template

It is best for you to write or start these letters, then have the donor change what they wish.

Don't forget to get permission in writing.

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## Letters

### Donor Story - Template

(you write, they approve and sign)

This is more about a donor's life than a testimonial. Useful for newsletter and recognition stories.

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## Letters

### Legacy Story - Template

(acquire written permission for use if personal)

You can find many examples of legacy stories that you can adapt to your charity.

If you subscribe to Planned Giving Today, US or Canadian version, there is much from which to choose.

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**Make 5 calls/day –  
25 calls/week**

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**Donor Calls and Visits**

**Tip 14** Remember to gear up before you start your telephone calls or visits. Speak phrases (to yourself) such as:

- It's show time!
- I'm ready!

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**Donor Calls and Visits**

**Tip 15** Remember the four SW's:

- Some Will
- Some Won't
- So What
- Some are Waiting (Next)

The fortune is in the follow-up.  
Call back, stay in touch - and do it promptly.

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## Donor Calls and Visits

### **Tip 16** Practice your calls

- be natural
- be understanding
- listen, listen, listen  
(2 ears, 1 mouth - use in that proportion)

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## Donor Calls and Visits

### **Tip 17** Make daily donor calls.

- book it as a daily appointment in your calendar

For me it is 2:00 p.m. - 4:00 p.m.

Every 'thank-you' call is money in the bank now  
and in the future.

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## Donor Calls and Visits

### **Tip 18** Best times for donor calls are:

- 10-11 a.m., 2-4 p.m.,  
(even if you leave a message)
- have a prepared message (part of your script) ready
- know your charity  
(prepare several donor ROI stories to share)
- thank-you and solicitation calls – decide what  
works best for you?
- survey calls, visits (prep sheets, don't get lost, listen)

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## Donor Calls and Visits

### Caller Scripts – Template

- Have several scripts to cover several scenarios
- Refer to handout
- I have found calls the most joyful part of the job

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**Make 5 calls/day –  
25 calls/week**

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## Marketing and Materials

**Tip 19** Develop brochures and newsletters with reply coupons.

- gift specific literature  
(Will Power, Insurance etc.)
- Ads (small ads in community newspapers)
- (Fifty Plus, senior' s newspapers like Forever Young-Kelowna
- Various senior' s news magazines in your area
- CA, CGA, CPA and Estate Planning Guide

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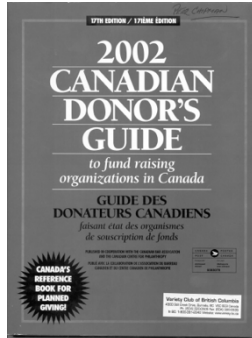
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## Directory Listing



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## Marketing and Materials

**Tip 20** Submit your stories to local, weekly newspapers.

- prepare half a dozen, ready to go
  - update every year
  - make generic but use your own bi-line
- insert legacy/bequest response slip with every (individual) tax receipt leaving your office
  - make it SOP (standard operating procedure)

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## Marketing and Materials

### Legacy/Bequest Buckslip - Template

|                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><b>LEAVE A LEGACY™</b></p> <p>Helping children who have special needs now and helping them in the future is how you can make a difference in the lives that will follow. With your help, Variety - The Children's Charity has been helping BC's kids for 40 years. With a gift in your Will, you can help them far into the future.</p>  | <p><b>I want to Leave a Legacy to Variety!</b></p> <p>Please send me more information about the following:</p> <p><input type="checkbox"/> Estate Planning, Wills and Executors</p> <p><input type="checkbox"/> Making a Bequest to Variety</p> <p><input type="checkbox"/> Charitable Life Insurance Gifts</p> <p><input type="checkbox"/> Creating a Trust or Endowment in my name</p> <p><input type="checkbox"/> I have already made a bequest to Variety in my Will</p> <p><input type="checkbox"/> Please have someone contact me in confidence</p> <p>Name: _____</p> <p>Address: _____</p> <p>City/Town: _____ Prov: _____ Postal Code: _____</p> <p>Tel: _____ Email: _____</p> |
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## Marketing and Materials

### Solicitor/Notary/Benefactor Letter

- Letters are in your handout.
- Have found that solicitor and benefactors are happy to receive
- It's always worthwhile to say thank you when ever possible

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## Marketing and Materials

**Tip 21** Send thank-you letters to 'anonymous donor bequests' via their solicitor/attorney/notary for forwarding to their clients.

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## Marketing and Materials

**Tip 22** Create a 'Recognition Certificate'



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## Reports

### Manager or Staff Report

Reporting to your manager or ED, your staff report should include current revenue plus:

- Number of calls made
- Number of new estates and value
- Number of estates in distribution
- Number of expectants and future value

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## Reports

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## Statistics & other

**Tip 23** Use your Excel spread sheet of estate history to create 5 & 10 year 'rolling averages' table

This is very useful at annual budget time

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## Statistics & other

Rolling Averages (Peter C)

| Year | # new Estates | Yearly Revenue | 5 yr Rolling Avg | 10 yr Rolling average |      |
|------|---------------|----------------|------------------|-----------------------|------|
| 1991 | 5             | 453,957.00     |                  |                       |      |
| 1992 | 5             | 37,728.00      |                  |                       |      |
| 1993 | 15            | 817,871.00     |                  |                       |      |
| 1994 | 6             | 354,508.00     |                  |                       |      |
| 1995 | 7             | 142,287.00     | 361,270.00       |                       |      |
| 1996 | 6             | 401,930.00     | 350,864.00       |                       |      |
| 1997 | 2             | 89,425.00      | 361,204.00       |                       |      |
| 1998 | 13            | 260,844.00     | 249,798.00       |                       |      |
| 1999 | 12            | 320,205.00     | 242,938.00       |                       |      |
| 2000 | 7             | 871,970.00     | 388,875.00       | 375,072.00            | 2000 |
| 2001 | 6             | 1,004,265.22   | 491,456.84       | 475,499.00            | 2001 |
| 2002 | 11            | 906,316.18     | 672,670.06       | 516,937.14            | 2002 |
| 2003 | 10            | 1,894,213.70   | 999,394.02       | 624,596.41            | 2003 |
| 2004 | 11            | 1,109,150.44   | 1,157,183.19     | 700,060.65            | 2004 |

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## Statistics & other

- Once a month (or quarter) review your donor activities
- Review specific donor background
- Keep filtering your lists
- If you have a team, try to meet once a month
- Don't be discouraged by not enough visit "-itis"
- You may have mostly telephone relationships
- Try community gatherings to meet your donors
- "Getting to know us" events work for us
- Donor survey every 2 years works well for us

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## After 12 Years .....

- 200 donor favorites (regular contact)
- 50-60 professional advisors (regular contact)
- 30 solicitors of estates in progress
- 300 donor/prospect relationships
- 450 expectants, worth \$32 million (don't forget they can change their mind)
- 2500-3000 donor-legacy prospect calls/yr to keep making HOW?

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**Why should charities be involved with LEAVE A LEGACY™ ?**

- Long term revenue & sustainability  
And it will help you build .....
- Short term opportunities (major gifts)
- Increased donor contact & loyalty
- Renewed annual & larger gifts
- Increased public profile for charity
- Build long term relationships
- Large cash gifts are not unknown

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**Example - Charity, Sponsor or Partner Use**



Variety – The Children’s Charity of BC  
is a proud partner of  
LEAVE A LEGACY™ British Columbia

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**THE SECRET ?  
Make 5 calls/day –  
25 calls/week**

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