

Perpetual Guardian
Bequest Programme Guide

Introduction

According to [Giving New Zealand](#) research (commissioned by Philanthropy New Zealand and carried out by BERL) between 2011 and 2014 bequests to charitable trusts in New Zealand increased from \$122 million to \$157 million.

Personal donations and legacies were the single largest source of philanthropy in 2011, contributing 58% of total estimated giving in New Zealand - up from 2006 at which time personal donations and legacies contributed just 35%.

Given this, you may be surprised to learn that only 50% of New Zealanders have Wills approximately, and only 7.5% of those people have made a charitable legacy in their Will.

At Perpetual Guardian we have over 100 years of Will writing experience and encourage charitable bequests. We aim to make legacy giving a social norm, and ensure that every New Zealander is protected by a Will.

Rationale

With over 27,000 registered charities in New Zealand, the fundraising market is crowded. Those with a presence built around collaboration are maximising potential across a number of fundraising streams and we are seeing new and innovative fundraising strategies.

Legacies can provide the largest income for charities and each charity has the potential to raise significant funds. The number of legacies being left is expected to increase from 7% to 15% of all Wills by 2020.

A fundraising strategy, with both short and long term goals is an essential tool for successful fundraising.

Legacies represent a potentially large source of revenue for charities with some reporting it represents 30% of their income stream (despite relatively low numbers of current Wills in New Zealand), and for 1 in 15 it is the largest stream. For this reason legacies, as a fundraising stream should not be overlooked by any organisation which plans to be around for the long haul.

This Legacy Programme Guide will support you with

1. Identifying your organisations readiness to create a legacy program
2. Development of a legacy strategy and reporting
3. Psychology of legacies
4. Marketing legacies and identifying those willing to give
5. Database options and management
6. Overcoming roadblocks
7. Campaigns and promotion
8. Legacy Champions
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APPENDIX – 1

Readiness assessment

Y	N	Questions
		Do you have a donor database?
		Do you have a contact database?
		Has your organisation been operating for more than 10 years?
		Have the board of directors and/or trustees passed a resolution supporting a planned giving program and dedicated financial resources adequate to support the marketing effort?
		Does your annual fund/membership programme have a consistent record of growth, both in the number of donors and number of gifts?
		Does your pool of prospects have a diverse age range?
		Are your oldest prospects retired or approaching retirement?
		Do you communicate on a regular basis with your prospect constituency through written, phone, web, and face-to-face efforts?
		Have you been notified of at least one legacy gift to your organisation within the past three years?
		Does your organisation have a member of staff position who can calendar and follow-up donors at least twice a year?
		Is your organisation willing to undertake legal action to resolve a legacy gift, if necessary?
		Does your organisation have a policy to resolve legal action in regards to a legacy gift?
		Do you have a structured investment management plan in place?

TOTAL	YES / NO
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APPENDIX – 2

Create your own legacy fundraising plan

As a fundraiser you cannot live without a fundraising plan, it is your blue print to success, and your legacy plan should be no different.

A legacy fundraising plan is designed to promote and encourage legacy giving. It will detail all of your fundraising activities, and answer all of the why, when, how, who and how much questions.

To get started you will need:

- To have completed the readiness assessment ([refer appendix 1](#)) and relevant steps contained there - in particular having a donor database fit for purpose, and board approval to solicit gifts in this way
- A background of legacy giving in the organisation including what has happened to date, what worked well and what didn't work
- An expense budget
- A case for support
- A dedicated Legacy Champion ([refer appendix 8](#))

Legacy plan template *

*This is a draft example only; please refine to fit the specific needs of your organisation

<p>Objective: To promote and encourage legacy giving. To increase, and maintain legacies written in favour of XYZ. To create relevant and engaging communications such as an engaging legacy mail out, pamphlet, appropriate letters and emails, upgrade website and social media, and ensure information is regularly included in newsletters.</p>			
Strategy	Timeframe	Key Relationship/s	KPI
Increase bequest income from \$XX to \$XX			Raise bequest income by \$X by DD MM YY
Initial engagement	By: DD MM YY	Legacy Champion, management staff and Board	<p>Complete Readiness assessment by DD MM YY</p> <p>Create legacy fundraising plan by DD MM YY</p> <p>Implement legacy fundraising plan by DD MM YY</p>

Create <u>launch</u> communications/event plan for legacies	By: DD MM YY	Legacy Champion, communications, marketing, and management staff and donor prospects	<p>Complete communication plan by DD MM YY</p> <p>Organise a bequest mail-out by DD MM YY</p> <p>Make xx personal phone calls by DD MM YY</p> <p>Visit xx donors by DD MM YY</p> <p>Organise x function/s by DD MM YY</p> <p>Update the website by DD MM YY</p> <p>Identify x donors to share their story by DD MM YY</p>
Target increased donor awareness	By: DD MM YY	Legacy Champion, communications, marketing, and management staff and donor prospects	Advise to <u>all donors</u> that XYZ would like to receive legacy gifts via their wills(after they have looked after their family and loved ones). Send written communication by DD MM YY
Create a legacy file on your donor database for potential legacies	By DD MM YY	Legacy Champion, communications, marketing, and management staff	<p>Flagging the following:</p> <ul style="list-style-type: none"> •Legacy letters sent; •Conversations and outcomes; •Conversion to a legacy; •Interest in a future legacy; •Donations given annually; and •‘Thank you’ is said in many ways, document this. <p>Ongoing monitoring</p>
Market the right message to the right audience	By: DD MM YY	Legacy Champion, marketing staff and donor prospects	<p>Complete segmentation of donor database by DD MM YY</p> <p>Prioritise segments by DD MM YY</p>
Create a <u>maintenance</u> communications/events strategy for legacies	By: DD MM YY	Legacy Champion, communications, marketing, and management staff and donor prospects	Complete communication strategy by DD MM YY

Create a management/legacy report	By: DD MM YY		Report to management and the Board on an appropriate basis eg quarterly, this may include <ul style="list-style-type: none">• Number of phone calls & visits to donors• Number of requests received for information on legacy giving• Number of new bequestors
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APPENDIX – 3

The psychology of legacies

“While over 80% of individuals give during their lifetime, it is estimated only 5% of those who die leave a bequest”. This is one of the facts to emerge from ‘Identification, Death and Bequest Giving’, a report by leading fundraising academic, Adrian Sargent. Professor of Fundraising at the Centre of Philanthropy, Indiana University, Sargent has built his career out of helping the world’s leading organisations achieve philanthropic growth. In 2010 he received a Civil Society Award in the UK for his Outstanding Contribution to Fundraising. In this report he offers plenty of advice to charities on how they can grow their legacy schemes by asking the question, ‘What sort of person leaves a legacy?’

To answer that question, you first need to understand the sorts of people who have a Will; if a person does not have a Will then they are the least likely to leave a legacy. Certain life events spur people to create Wills: those who had recently lost a family member, have just had a child, been diagnosed with a terminal illness, or recently undergone a change in their financial assets (for example, bought their first home), are exponentially more likely to write down their wishes.

But the fact is approximately 50% of New Zealanders do not have a Will. The most common reasons given are, “I do not have enough money”, “I am too young”, and “I do not have the time”. Many people would rather do their taxes or remain celibate for a month than go through the process of writing a Will! Writing a Will certainly does not have to be a painful experience, nor does it require a huge amount of time or effort. For those who find discussing their financial and personal affairs uncomfortable, there is always the option of using an online Will service, such as www.ewills.co.nz

Another major but often unspoken reason people give for not having a Will is anxiety; many simply do not want to confront the prospect of death. Fear of death is not unusual but it is even more common amongst the elderly who may feel they have not lived life to the full. Levels of self-esteem often decline after middle age, and they seek out alternative sources of self-worth. “This may have implications for the solicitation of charitable bequests”, explains Sargent, “since individuals may be aided to have a significant impact on a cause they felt was important in life”. Charities can appeal to individuals with this mind-set by emphasising the difference they could make through leaving a legacy, and perhaps providing them with motivation by offering a token of recognition either during their life or after death.

So, what about people who do have a Will? What psychological barriers prevent them from including a legacy? Firstly, there is a lack of awareness amongst the general public that legacy-giving is even an option. Everyone is aware of how to give during their lifetime, but for many people giving after death is slightly more mysterious. To overcome this, it is important to educate donors about their giving options. One reason donors may be attracted to a legacy over lifetime giving, is it allows them to maintain control over their assets in case they decide to change their legacy. This degree of flexibility is not available with immediate donations.

Individuals may also be concerned leaving a legacy would come at the expense of their loved ones. This is a legitimate concern but no charity would ask a person to leave a donation which could cause their family financial hardship. To make things simpler, there are multiple forms of legacies donors can choose to make: a pecuniary legacy is a fixed sum of money (eg \$5,000 to your charity of choice); a residuary legacy allows you to nominate a percentage of the estate which is left over after all the other provisions and expenses have been paid. Even electing to leave 5% of their estate can make a big difference.

And this leads into the third mental obstacle preventing people from leaving a legacy: the misconception that legacies are only for the rich and famous. You do not have to be a millionaire to leave a gift to your favourite charity. Legacies are not just limited to cash gifts; you can nominate to leave particular assets to an organisation. Pet-owners may be comforted to know that they can even leave care of their pets to their local SPCA, who will ensure the animal finds a loving home. Other assets you can leave to a charity include real estate and artwork.

APPENDIX – 4

Marketing legacies

In order to grow the number of legacies they receive, charities should develop a planned legacy giving programme and promote its benefits. If your charity uses a donor database such as Raiser's Edge, utilise your data to create an introductory mail campaign and send it out to donors over 45, detailing the benefits of your programme. It is around this age when most people start to consider writing a Will, and the likelihood of writing a Will increases more with age. Encourage donors who already have Wills to make sure their Will is current and provide them with the wording they need to include a gift for your charity.

Do not just limit your campaign to the over 45's, however. All donors over 18, particularly those who make annual gifts and regular contributions should be approached about pledging a legacy. Soliciting legacies should always be handled with care, sensitivity, respect for the donor and confidentiality. *Focus on the positive things their legacy would help achieve and include a case study to demonstrate this.*

Donors who sign up should not have to wait until death to receive recognition for their charitable legacy. Many fundraising experts recommend charities set up a legacy society. For the donor, this allows them to feel acknowledged and receive invitations to exclusive events. For charities, the value of creating a community of givers is enormous; it is a great way for a charity to express its appreciation, and also provides them with the opportunity to ask for current donations. When choosing a name for your organisation's legacy society, consider naming it after a major donor or establishing member.

It is important to make your donors feel loved by sending them a small gift, a newsletter and a Christmas card. *It is these small tokens of thanks which keep donors coming back.* From a donor-retention perspective, this approach has a high return on investment; *Adrian Sargent's research found donors who received a thank-you for their contribution were four times more likely to leave a gift during their lifetime as well.*

Depending on your organisation's budget, a print advertising campaign may be a viable option for educating the public about your legacy programme. As mentioned earlier, there is a lack of awareness and understanding around legacies amongst members of the public.

An example of an innovative and highly effective legacy marketing campaign was carried out by the Children's Cancer Institute of Australia, who created a 'bequest conversion pack' for their donors. The pack, which was sent to all regular and high-value donors, included a personalised letter thanking them for their generosity and asked them to consider leaving the CCIA a "very special and deeply personal gift". It included an emotive case study of a child cancer survivor and how a legacy would help fund the CCIA to work with even more children. The campaign had excellent results; the CCIA went from having no legacy programme, to having 136 confirmed legacies, and 200 more donors expressing their interest.

Although it may take several years for your organisation to receive the benefit, the financial reward of cultivating legacies is worth it.

Who are your best prospects for legacies?

First, look for involvement. People who make a legacy to your organisation are treating your non-profit like a member of their family.

Think of people who are connected to the organisation, have been involved with it intimately, and know its needs:

- Committee members;
- Board members;
- Staff past and current;
- Members past and present;
- Member's family;
- Volunteers;
- Previous donors;
- Key stakeholders; or
- Family members e.g. grandparents of a 'heart child'.

Identification by age, time engaged, gift history

The best indicators of legacy potential are age (65 and over), frequency of gifts, length of time as a member (three years or more minimum) and gender. The majority of legacies to charities are from women who never married, or who outlived their husbands. This is sometimes referred to as the FLAG system (frequency, longevity, age, gender) of identifying potential donors.

It is worthwhile to look at your lapsed (un-renewed), as well as current members for legacy prospects, to increase the number of prospects you have to work with. Lapsed older donors are often excellent prospects for legacies. They may be on a fixed income and unable to send money, but still interested in your organisation and willing to consider leaving you something in their Will.

Often people just need to be asked the question!

Profile of an average legacy pledger: average

- 45-54 years old, with a household income of \$93,000 or more;
- Moderately religious; those with religious beliefs were more likely to leave a charitable gift (although this depends on the cause); and
- Children have grown-up and left home; over 80% of legacy donors have no children under 18 years at home. When children are financially well-off, parents increase their giving.

Tips on growing legacies:

- *Donors who receive a letter asking them for a legacy were seventeen times more likely to give than those who are not*
- *Donors who are thanked give twice as much as those who are not*
- *When a charity keeps in touch with a legacy pledger (e.g. letters, event invitations), the person is more likely to action a legacy and retain that legacy*

Least likely donors

Target: Lower value and volume

We already know New Zealanders are among the most generous in the world - second only to the USA - so legacy giving need not be about just engaging the wealthy. Aotearoa is a nation of givers!

Many charitable organisations do not let their constituents know they would like to receive these gifts and most individuals do not think an organisation is interested in receiving gifts of a moderate value.

No matter what the value, we can encourage more people to consider leaving a charitable gift in their Will, once they have looked after their family and friends.

Everyday donors

Target: Medium to high value

- Important prospects for planned gifts and legacy giving are not necessarily the “major annual donors”.
- The best prospects for development are individuals, who made more than a single gift to the organisation, have a long history with the organisation, are over 55 years old and who have reasonable net worth.
- Their net worth may primarily be in property or assets which do not produce income. They are usually individuals who have been small or moderate long term contributors to the organisation. They are also advocates of the organisation.
- Legacy pledgers are four times more likely to give current donations as well.

Prime donors

Target: High value

These fiscally-responsible people are concerned about their resources and exhibit both specific lifestyles and life stages; their current incomes might be fixed or very high.

They have the ability to make planned gifts at significant levels and they have actively made legacies at mid-life and then again at older ages.

Often it is their attitude to finances and habitual giving patterns that help identify them including;

- Consistent charitable donations to multiple organisations;
- Connections to a family foundation or a donor-advised fund;
- Real estate holdings other than the primary residence;
- Private business holdings of at least \$1 million; and
- Collective known assets of \$2 million or more.

Those who are retired or approaching retirement are strong legacy prospects.

APPENDIX – 5

Database options and Management

There are many options for databases with various prices.

If you have limited funds you can use an excel spreadsheet, creating a page for each segment outlined below or each campaign. It is important to ensure the data is entered correctly with a column for each part of the address e.g. title, first name, last name, date of birth (important for legacies), ethnicity, street number, street name, suburb, city, post code, phone number, cell phone, email address.

TechSoup also have Exceed Basic by Telosa (www.telosa.com) and can be purchased for a low 'one off' fee through TechSoup.

Another affordable option is Little Green Light through TechSoup. It is available at a cost of approximately \$100 per month and you are able to export any databases as you upgrade.

The Little Green Light donation program at TechSoup New Zealand provides cloud-based donor management CRM software to eligible nonprofits, charities, and public libraries throughout the United States. You can use [Little Green Light](#) to track information about your donors, prospects, volunteers, event attendees, and board members.

Blackbaud have two options called Razer's Edge and a cheaper version called e-Tapestry. These are tailored CRM systems for fundraising and commonly used in New Zealand. Both are cloud based.

Do the research, ask around other charities what they use and ensure it meets your needs and budget.

Segmentation options

Segment by giving amount

- Donors who give above X
- Donors who give below X
- Major donors
- Top donors

Segment by timing

- Have (not) given in last six months
- Have (not) given in last 30 days

Segment by types of giving

- Monthly donors
- Annual donors

Donors who have made a legacy
Donors who have given to a particular fund
Donor to a particular event
Sponsor

Segment by relationship to your organisation

Legacy donor (parents gave)
Volunteer donor
Board donor
Past board donor
Alumni donor
Member donor
Lapsed member donor

Segment by relationship to people in your organisation

Friend of board member
Friend of staff
Relative of board or staff

Segment by donor's area of interest

Scholarships
Bricks and mortar projects
Naming opportunities
Specific programs or projects
Specific groups of clients (giving to youth programs, disabilities etc)

APPENDIX – 6

Overcoming the roadblocks

The Road Block	The Rationalisation
<p>My estate will be small – my money will not make a difference</p>	<p>When we hear the word ‘philanthropy’ we often think of wealth and significant financial donations, but any gift no matter how large or small can make a difference.</p> <p><i>‘We ourselves feel that what we are doing is just a drop in the ocean but the ocean would be less because of that missing drop.’ – Mother Teresa</i></p>
<p>I have to look after my family first</p>	<p>We agree - it is important you provide for family members and loved ones first and there may be legal ramifications if you do not.</p> <p>No matter what the value we encourage people to consider leaving a charitable gift in their Will, once they have looked after their family and friends.</p> <p>Getting good legal advice from the team at Perpetual Guardian will ensure you have all legal points covered</p>
<p>I had no idea I could leave a legacy</p>	<p>You can leave a legacy or one off gift via your Will.</p> <p>Other options include the creation of a charitable trust (limited life or perpetual), or creation of a sub-fund within a Foundation structure. Ask Perpetual Guardian about their Foundation. Both can be instructed via your Will</p>
<p>I would rather give during my lifetime</p>	<p>You may choose to make regular out of your income while you are living. There are tax benefits for individuals and companies who make donations to organisations with approved donee status from the IRD.</p> <p>There are also a range of charitable vehicles to help you define, secure, and if needed perpetuate your charitable intentions. For example, a charitable trust which can have a limited life-span or exist in perpetuity. These can support specific demographic groups, regions and/ or causes close to your heart eg child poverty</p>

I do not need a Will	<p>Every New Zealander over the age of 18 is encouraged to leave a Will, no matter how large or small the asset base. A Will protects family and/ or loved ones, making things easier at a difficult time.</p> <p>Without a will estates may incur extra costs which could have gone to a specific person or cause.</p> <p>A will helps to ensure your estate is distributed according to your wishes.</p>
Wills are too expensive	<p>Perpetual Guardian offer expert advice and competitively priced wills. They believe every adult New Zealander should have a Will and every child deserves the protection of one email philanthropy@pgtrust.co.nz or phone 0800 87 87 82.</p>
If I make a bequest, I want it to be confidential	<p>Many people leaving a bequest wish to do so in confidence. This comes down to client confidentiality and is of the utmost importance.</p>

Use open questions

- To get facts
- To get opinions, feelings or perspectives
- To be thought provoking
- To gain insight

Know your no's

- No, not for this
- No, not you
- No, not me
- No, not unless
- No, not in this way
- I already have included your charity (confirmed - undefined)
- I've left a percentage of my estate (confirmed – residual)
- Yes, I'm going to include your charity (intending)
- I'll think about it (considering)
- No, I'm not interested now (no, not now)
- No, I'm not interested in ever including you in my Will (no longer a prospect)

A Fundraiser must observe a donor's request to:

- Confidentiality regarding any bequest;
- Refuse to make a bequest;
- Limit the frequency of solicitations by the fundraiser to the donor;
- Not be solicited by mail, telephone, facsimile, email, text messages or other technology;
- Not receive personal visits;
- Not receive printed material concerning an organisation;
- Have a family member or legal personal representative present;
- Obtain independent legal advice; and,
- Exclude any form of public recognition for their bequest if they choose to remain anonymous.

Appendix – 7

Campaigns and promotion

We believe that the key message of any bequest programme must be the impact a bequest could have on the organisation - the difference it would make in terms of social and/ or environmental impact. Utilising real case studies is important, supports emotional resonance and brings your message to life!

Referring to Perpetual Guardian

- Refer to an experienced will and trust estate management company
- Leads are followed up directly by an experienced consultant
- Each will is checked by a legal specialist (this is designed to reduce the risk of the will being contested)
- If you are presenting to potential bequest target groups on the work of your organisation, Perpetual Guardian can co-present on the importance of having a will, costs, how to go about leaving a bequest and follow up any leads
- For special events with donors (such as 'Circle' events) we can provide a will specialist to be on hand and answer any questions regarding leaving a legacy
- To find out more email philanthropy@pgtrust.co.nz

Making it easy

After telling your story and sharing a case study - use wording such as:

Making a Will and leaving a legacy is easy. Contact Perpetual Guardian who are will specialists by emailing philanthropy@pgtrust.co.nz or phone 0800 87 87 82.

Leaving a gift in a Will

The primary purpose of a Will is to ensure the future of families, loved ones and pets are cared for first. However New Zealanders are becoming more conscious of paying it forward and as a nation we are very generous. Bequests is an area of growth in Aotearoa.

We hear a lot about the big gifts to charities by notable New Zealanders, but the reality is without the gifts left in Wills, many of the charities we know and support today would not exist. Most of us have the ability to leave even a small legacy to a charity.

The bequest donation can be as small or large as people like.

APPENDIX – 8

The importance of a Legacy Champion in your fundraising team

It is important to the success of the legacy programme to have a champion to take the lead and own the outcomes.

The role of a Legacy Champion includes:

- *Create a legacy marketing plan;*
- *Identify and segmenting prospects;*
- *Communication: stewardship and nurturing relationships;*
- *Engagement with prospects;*
- *Document and report activities ; and,*
- *Communication with Perpetual Guardian and other relevant will providers.*

Qualities of a good Legacy Champion include:

- *Good interpersonal skills;*
- *Great at building lasting relationships;*
- *Intuitive listener, astute;*
- *Organised;*
- *Observant;*
- *Patient ;*
- *Mobile;*
- *Confident ;*
- *Philanthropic;*
- *Warm, engaging, friendly, empathy;*
- *Not too pushy, sensitive to signals;*
- *Can tell stories and write these well;*
- *Able to use multiple communication styles;*
- *Overcoming objections;*

- *Being able to focus on the conversion numbers / on the end result;*
- *Ability to build rapport quickly/keeping donors engaged i.e. Morning teas, face to face visits, often a slow process but rewarding;*
- *data management skills and ability to monitor trends; and*
- *not being afraid of the phone or to ask!*

Examples of KPI's for Legacy Champions:

- *Raise \$x in bequest income.*
- *Organise a bequest mailing;*
- *Organise x function/s;*
- *Visit xx donors ;*
- *Make xx personal phone calls ;*
- *Identify x donor/s to share their story;*
- *Identify x additional bequestors; and,*

APPENDIX – 9

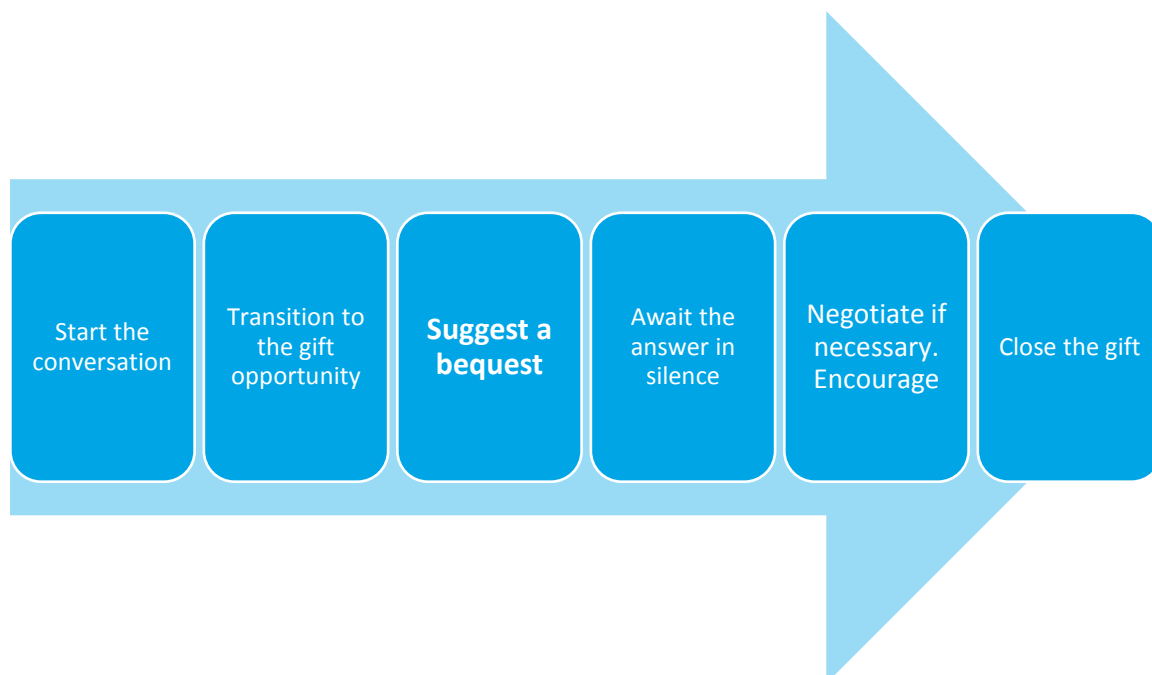
Forms of engagement

- Functions, tea & tours
- Face to face visits
- Personal phone calls
- Invite them to share their story
- Marketing (mail-out, web etc)
- ***Thank them and thank them again***

Letter 'first ask' tips

- Personalise the letter
- Thank them for their past support
- Invite them to make a special difference and share a case study of how a bequest (or other donation) has had an impact – share a story with emotional resonance
- Call to action and provide contact details for Perpetual Guardian
- ***Thank them and thank them again***

Phone Scripts



The main reason for my call is...

<Name of CEO> asked me to give you a call about the letter/email she sent you...

You might recall we spoke a few months ago to discuss...

You said you wish you could do more to support us. There is a way you can, and I'd love to share it with you...

Is including us in your Will something you would consider?

Options to include:

- I was speaking to a lady/man in your suburb just the other day who has just included us...
- I wanted to share with you the amazing story of little Suzie, she... The research has only been made possible by donors including us in their Wills. You will mean...
- Did you know half of our research is only made possible because of people like you including a gift in their Will?
- We find some of our supporters decide to include gifts in their Wills to our charity. It is a different way of supporting us.... Is that something you would think about?
- It is something you don't have to commit to now.
- Think about it, and if the time is ever right for you to include us in your will, please remember us.

Options for follow-up calls:

First refer to your notes from the original call

After warm introduction and explanation for call

Some querying options

- Are you still considering including us in your Will?
- Have you made contact with Perpetual Guardian who are experts at preparing wills or been to visit your solicitor yet?
- What timeframe do you plan for updating your Will?
- It sounds like that will take a few months, why don't I give you a call in April and see how you're going with your plans, and if I can help in any way.
- I'd love to give you a call in six months to see how you're going with that.

So many thank-yous to be had:

- Thank you for your time
- Thank you for your past support
- Thank you for considering a legacy
- Thank you for including a gift in your Will

Please feel free to call if I can help you at all. My name is...

It was a pleasure to speak with you

Letter ‘thanks for your inquiry’

- Personalise the letter
- Thank them for their enquiry
- Invite them to make a special difference and share a case study of how a bequest (or other donation) has had an impact – share a story with emotional resonance
- Call to action and provide contact details for Perpetual Guardian, for example

‘Contact Perpetual Guardian who are experts at preparing wills by emailing philanthropy@pgtrust.co.nz or phone 0800 87 87 82. You can also consult with your lawyer and ask for appropriate clauses to be inserted into your Will and/or memorandum of wishes’.

- Thank them and thank them again
- Ask the CEO to write a brief hand written line of acknowledgement

Advertisements

Put a simple advertisement or article in every issue of your newsletter and annual report encouraging your members and related audience to make a legacy. Use examples of small and large legacies and how they have helped in the past.

Share case studies, use picture of people or services.

Refer to Perpetual Guardian, for example ‘Making a Will and leaving a legacy has never been so easy. Contact Perpetual Guardian who are experts at preparing wills by emailing philanthropy@pgtrust.co.nz or phone 0800 87 87 82.’

Have a gimmick such as a post it note picture saying **“The gift of giving in your Will”** or **‘Pay it forward’**.

Personal Visits

- Visit must be pre-arranged
- Approximately one hour
- Be aware of social boundaries
- Update on news of organisation
- Donors have the right not to include a gift in their Will
- Thank them and thank them again
- Leave a designed pack with information and business card

Seminars or afternoon teas

Invite Perpetual Guardian staff to present on:
“How to create a Will and leave a legacy.”

Make the session brief and refreshments and tell a story, use the chance to introduce staff, ask them if they can help spread the word.

Have pre-made professional packs made up for each person and spare copies.

Website

Be sure to include:

“How, why, where” you should have a Will and make a legacy. This should be uplifting and engage the reader to make a legacy. Share a case study of how a legacy has helped the organisation and use pictures.

Remember you cannot be involved in the creation of someone’s Will or legacy. Direct them to the appropriate services and provide an example statement online (see further on) they can use if they so wish.

For example, ‘Contact Perpetual Guardian who are experts at preparing wills by emailing philanthropy@pgtrust.co.nz or phone 0800 87 87 82’. You can also consult with your lawyer and ask for appropriate clauses to be inserted into your Will and/or memorandum of wishes.’

Acknowledge past legacies givers, who they were and what it resulted in. Ask family members for a photo and a brief biography for the website. Acknowledging both small and large legacies make a BIG difference to the organisation.

To find out more about legacies or other options contact:

Insert details

Saying thank you

We cannot stress how important this is. Retaining legacies requires strategies that ensure the legacies are maintained and grown if possible.

Consider the following:

- A 'naming opportunity' if the legacy is large enough. For example a \$100K for research could be named after that person.
- Scholarships in memory of 'Mary Smith' with a brief biography.
- Creation of a symbol such as 'Angel' or 'Star'. Both of which give a reference to giving and life after.

Put this process of recognition clearly in your plan and resource. It can be made into a symbol such as an angel or star on your newsletters or social media. No one can own these names as they are general terms so you will need to remember they are going to be used in the wider charitable trust community.

Website legacy example

When you make a legacy to xxxx, you are contributing to the greater good of your local community. We need your support. The demand for our services increases every year as New Zealand's population grows and ages.

A legacy in your will is an easy way to support xxxx. You can even decide how you want the legacy to be used. Many legacies continue to provide valuable support to our services, long after the gift has been received.

If you already have a Will

If you would like to include a legacy to xxxx in your existing Will, you can make a simple modification by adding a codicil (a codicil is a supplement to a Will intended to alter or modify it). To make sure your codicil is legal, we recommend it is checked and approved by a legal advisor.

If you do not have a Will

Making a Will and leaving a legacy has never been so easy. Contact Perpetual Guardian who are experts at preparing wills by emailing philanthropy@pgtrust.co.nz or phone 0800 87 87 82.