

# LEGACY GIVING MESSAGING



# Welcome and introduction

- I \*LOVE\* legacy giving!
- Specializing in legacy giving since 2012
- Wrote *“How to Talk About Legacy Giving”* & *“How to Engage Potential Legacy Donors”* to help people dive into this vibrant yet sometimes misunderstood area of fundraising



# Legacy giving messaging can be simple

It doesn't have to be hard!

We can talk more about what matters to people

For most orgs 90%+ of legacy gifts are gifts in Wills

Focus on what people are already choosing and  
avoid complicating things

# Legacy giving is about our life story

Legacy gifts are most often from long-time donors

Dr. Russell James' research—legacy questions activate areas responsible for a “visualized autobiography”

People visualize how a legacy gift would fit into their life story and see that story continuing

**Help them dream!**

# Legacy giving is about symbolic immortality

Human beings live our lives knowing one day we will die

This can be overwhelming for people, so we look for ways to soothe our anxiety about death

One way is through creating lasting legacies that will continue beyond ourselves

# Legacy giving is about symbolic immortality

"[One] means of achieving immortality is to assure that some aspect of one's identity, or some legacy of one's existence, will live on after death. This symbolic immortality promises that we will still be a part of something eternal after our last breath, that some symbolic vestige of the self will persist in perpetuity."

- from *The Worm at the Core*,  
on the Role of Death in Life

# Legacy giving is about who we are & what we're part of

Philanthropic Psychology – study of giving decision making, donor identities and more

Legacy giving is strongly connected to our Organizational Identity and Moral Identity

Organizational identity – “I’m a \_\_\_\_\_ supporter.”

Moral identity – “I’m caring, generous, kind.”

Reinforce these identities in your legacy messaging

# Legacy messaging vs. general fundraising messaging

## Legacy messaging fundraising

## General

Broad

Specific

Long-term vision

Immediate needs

Help future generations/society

Help beneficiaries

Personal, private

Social

norms

# Why have a legacy key message?

Helps supporters focus on and remember core points

Keeps everyone “singing from the same songbook”

Helps reluctant folks talk about legacy giving

So you can repeat legacy ask in a well thought out, pleasant way

Useful in numerous donor contact points

# Why have a legacy key message?

Integrate your key message into:

Website

signature

Case for Support booklet

Newsletter articles

Donor conversations

Surveys

Your voicemail message

Email

Videos

Email campaigns

Supporter

Annual Report

# My key message formula

## Donor + Impact + Vision + Call to Action

Start with Donor – You/Your

Follow with the impact they have or can have

Remind of future vision that Org and donor share

Make the ask!

# Example

You helped realize the dream of building a state-of-the-art hospital in [City] *[donor]* so friends and loved ones receive the care they need, right here at home. *[impact]* Our aim is to continually improve healthcare—for you, and for future generations. *[vision]* As a caring community member you can help—please, consider a gift in your Will to ABC Hospital Foundation. *[ask]*

# Tips: getting started on a draft key message

Consider the words in your mission, vision, values, tagline

Think about WHY you do what you do and WHO you do it for

Decide on one of the three sample methods

Put something down on paper – it doesn't have to be good yet!

# Tips: What to do next

Make it shorter – keep revising until there are no superfluous words

Let it rest for a few days – then revise again

Run it by people – do they easily understand it?

Ask them a few days later, what do they remember about it?

\*Send it to me! (Seriously!)

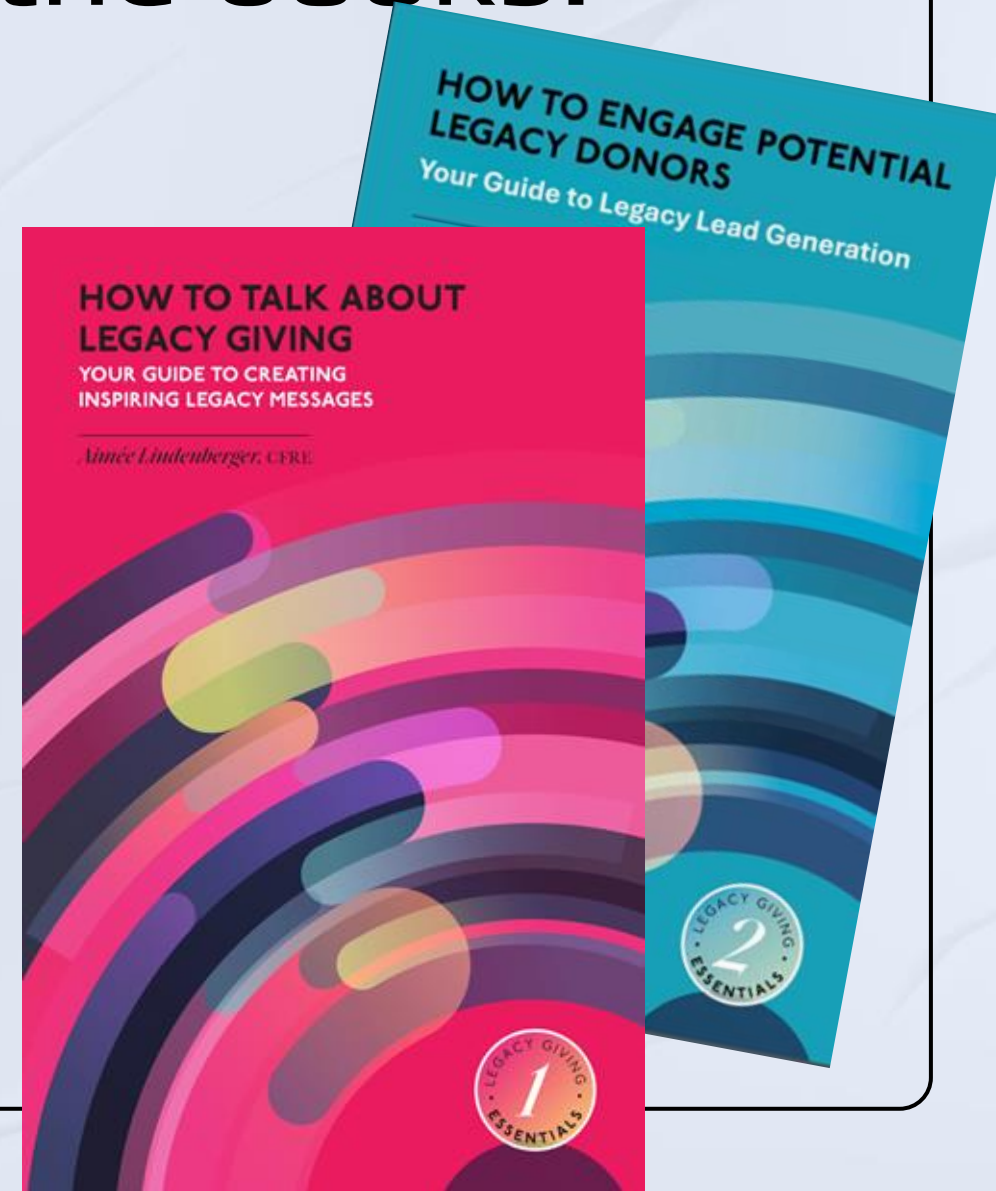
# There's lots more in the books!

Order from the publisher at:

<https://hilborn-civilsectorpress.com/products/how-to-talk-about-legacy-giving>

Or,

Order on Amazon:





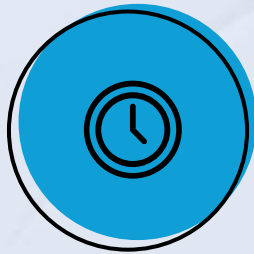
**WHY DO WORDS MATTER?**

# TOP 5 CONCERNS OF LEGACY DONORS

*& HOW TO ADDRESS THEM*

# THE OBJECTIONS

01. "I don't want to think about my demise right now."



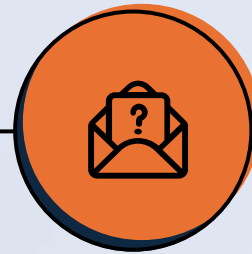
02. "My kids will hate me!"



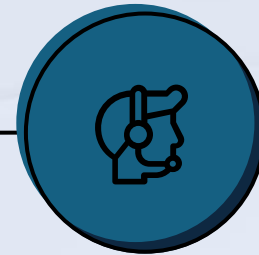
03. "It sounds complicated."



04. "Legacies are for rich people. That's not me."



05. "You are just going to fritter away my gift."



01

*"I DON'T WANT TO THINK ABOUT MY  
DEMISE RIGHT NOW"*

RESPONSE:

Legacies aren't about death ... they are about your values living on & having impact

01

*“Isn’t it lovely to imagine what Canada might look like in the future if more of us took this step and made a bequest to CPAWS?... I hope that when you consider your future plans, you too will consider the future of conservation in this country.”*



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### ROWENA'S CORNER Samantha's Story

"My job as a national champion gives me the opportunity to help people. It reminds me that there are people in the world that don't have enough food."



Rowena's Corner  
- David Saiter - a legacy  
of fighting injustice  
and poverty

"I want to leave a legacy not just for my daughter, but for other people."

### ROWENA'S CORNER

"My mum was diagnosed first but she just was never old, during the war."

People helped her and helped her help. Thank the ones before her.

Children is something that's close to us because it's a chance that we parents support.

I think the bit that really makes the difference to people's lives is the development and empowering people. Just giving it back to us that they can help them.

That's something that I think should really work.

So when we did our trials, to have a little bit to children that's a very worthwhile thing to do.

We must end to me. If we all help ourselves and they help themselves it spreads.

It's a bit like planting the seed and that gives like some seeds that can be shared with other people."

For information on leaving a gift to your will, please contact Rowena at [rowena@oxfaminternational.org](mailto:rowena@oxfaminternational.org) or 01223 277633

I like the work that Oxfam does to support children."



"Without support, we would be waiting for the rain, but with this support we have a seed, we can get water anytime and we have a lot of crops."

Our gifts help guarantee the harvest in places that traditionally do not have enough food and

work in the hardest of circumstances. Here and there but one another, here help and work to improve their lives. Being the most responsible to succeed in making her."

For more information on leaving a gift to your will, please contact Rowena at [rowena@oxfaminternational.org](mailto:rowena@oxfaminternational.org)

02

*“MY KIDS WILL HATE ME”*

RESPONSE:

“They will be so proud!”

“Of course, we all want to take care of our families first.”

THE CONCERN that a charitable gift in a Will takes away from loved ones far outweighs any other concerns about legacy giving



*Fundraisers should take care to address this one barrier in their messaging.*



*"My mom died 7 years ago.*

*But before she died, she did a wonderful thing."*

02

26

August 18, 2008

John CCS08018 Sample  
1234 Any Street  
Anytown, BC V1A 2B3



*From the desk of Barbara Gillanders*

Dear Mr. Sample,

I have never met your mother but I believe she has many things in common with my mom.

I know both our moms loved us. I know that both of them did the best they could for us, their children.

In fact the older I get, the more I appreciate what my mom did, and how she made a difference in my life and the lives of others.

I'm writing you today to tell you about one thing my mom did that is a gift to you and everyone in our community.

I also hope her action inspires you.

My mom's name is Norma West. She died 7 years ago. But before she died she did a wonderful thing.

03

*“IT SOUNDS COMPLICATED”*

RESPONSE:

It's easy!

03

*“Adding the Lions Foundation of Canada Dog Guides to my Will was very simple to do. You need to know the official name of the organization and their charitable registration number, and your lawyer, notary or family advisor can do the rest.”*

*- Joanna*



*“LEGACIES ARE FOR THE RICH AND FAMOUS. I’M NEITHER.”*

RESPONSE:

Share stories from ordinary people.

04

*“Some people may think that this type of giving is only for people with very large estates. Nothing could be farther from the truth.*

*Any gift in a Will is extremely impactful. Your legacy gift will help Indigenous students continue to receive the support they need for years to come.”*

04

*"I know some people feel it's only the wealthy who get to leave gifts in their will to their local hospital. They are usually surprised to learn that most bequests come from hard working people who lead modest lives, who simply want to help their communities."*

05

*“YOU ARE JUST GOING TO FRITTER AWAY MY GIFT.”*

RESPONSE:

You can TRUST us.

05

*“As a former volunteer on the board of the Foundation, I am confident in our decision because I know that our bequest will be well spent.”*