



WHO ARE WE TALKING TO?

Who?

The old way: focus on wealth and capacity. Under-valued loyalty, shared values and connection

Instead: Leaving a bequest is for everyone. The most meaningful legacy gifts do not always come from wealth.

“I’m just an ordinary person ... but I want to make a difference.”

More than a strategy >> a responsibility

Who?

- Long-time donors (even lapsed)
- Monthly donors (even lapsed)
- Older supporters
- Loyalty, frequency: not size of gift
- Those who donate and volunteer
- People who proactively engage: notes or letters with gifts, change of address

Your next legacy donor is probably already in your database

How do we find these fabulous folks?

We know that prospective legacy donors are not always your highest dollar-value supporters, or even your most recent supporters. That's why it really is best to keep the legacy idea in front of everybody.

But if you have a large donor base and need to really focus your efforts, here's where to look:

- › Direct mail donors
- › Boomers / Matures
- › Length of time a supporter (year of first gift)
- › Repeat giving
- › Are involved with your organization in a number of ways
- › Proactively engage with you
- › Make multiple tribute and In Mem donations
- › Age predictors (top tip: look for Mildreds!)





MONTHLY DONORS!



Spotlight on legacy donors

7

How do we find these fabulous folks?

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HOW DO I REACH THEM?

Inclusive, consistent messaging

You can't know when your donor is going to make or update their Will. Life will decide that for them.

But when they do, and their advisor asks “*Would you like to make any charitable bequests?*” You want them to remember you.

QUICK CAVEAT:

Immediate results don't
paint the whole picture.



THE FAMOUS “DRIP
DRIP” APPROACH TO
LEGACY FUNDRAISING
COMMUNICATIONS



Think “Drip Drip” Legacy Fundraising



- Tick box on direct mail reply forms
- Test a buckslip in your direct mail packs
- Buckslip (comp slip) in thank you letters
- Annual bequest mailing with survey
 - (P.S. Yes! Surveys still work!)
- Email survey
- Mail series
- Legacy Newsletters/ Regular features in newsletters
- Website / Social media leads
- #BIBs - Bequest Inspiration Booklets

Focus on presence and consistent messaging over time; tell stories not technical detail

PIGGYBACK

- Tickboxes
- Buckslips
- Website – Legacy page(s)
- Newsletter – Legacy stories
- Social Media
- Thank You letters



STAND-ALONE

- Email campaigns
- Bequest Appeals (with and without surveys)
- Bequest Booklets
- Website
- Social Media



Sample Legacy Plan

AUDIENCE	Ideas to consider	January	February	March	May	June	July	Sept	Oct	Nov	Dec
Donor & industry events	Zoom/In-person donor events: treat legacy donors and legacy prospects as well as you treat major donors; special breakfast briefings with trusted advisors; make use of Will Power etc										
What are House donors receiving?	Newsletter	Renewal 1 with HiValu versions	Renewal 2 with HiValu version	Special Appeal	Summer newsletter	Special Appeal	Holiday Appeal 1	Holiday Appeal 2			
DRIP DRIP Legacy message piggybacking on House appeal	Newsletter should always feature a bequest donor	Check-box on donation form; PS in thank you letter	Check-box on donation form; Test special PS in thank you letter					Check-box on donation form; PS in thank you letter	Check-box on donation form; PS in thank you letter	Check-box on donation form; PS in thank you letter	
Targeted Legacy Solicitations & Cultivation stream for Top Legacy Prospects	Special cover letter with newsletter, drawing attention to the bequest features	Legacy ask to monthly donors who are receiving their annual tax receipt			Stand alone Legacy Appeal			Special cover letter with newsletter, drawing attention to the bequest features			End of year special thank you card

Donor Interests Survey

In an effort to serve you better as a donor, we invite you to complete the survey below. All information will be kept confidential. Please mail your completed questionnaire to us in the business reply envelope provided.



1 Which of the following statements best describes your connection to nature?

- I enjoy being in the outdoors and seeing wildlife, and want future generations to be able to experience what I have
- I believe conserving our landscapes and seascapes is the right thing to do
- I believe we need to conserve more, as demonstrated by scientific evidence
- Other (Please describe): _____

2 Which of these topics are you most interested in?

- Land and freshwater protection
- Ocean protection

3 What do you think about the option of making a gift in your Will to CPAWS?

- I've joined by filling out the front of this form
- It's a great idea — Please contact me by _____
- I'm interested in the option and will consider it
- I'm not sure it's the right fit for me
- I prefer to donate with single gifts to CPAWS

4 How does CPAWS rank among the charities you support?

- CPAWS is one of many charities I support
- CPAWS is among the top five charities I support
- CPAWS is my favourite!

5 Are you interested in learning about ways to become more involved in our work?

- Yes, please contact me
- No

6 Have you considered making a gift in your Will to CPAWS?

- I have already included a gift in my Will to CPAWS
- I would like to receive information about including a gift in my Will
- No, I don't require further information at this time
- No, but I have mentioned other charities in my Will
- Undecided

6 Have you considered making a gift in your Will to CPAWS?

- I have already included a gift in my Will to CPAWS
- I would like to receive information about including a gift in my Will
- No, I don't require further information at this time
- No, but I have mentioned other charities in my Will
- Undecided

LET PROTECTING HUMAN RIGHTS BE YOUR LEGACY TO THE WORLD

A gift in your Will costs nothing now, but it means you can ensure Amnesty International will always be there for people around the world.

Join us as a **Human Rights Guardian** by leaving a gift in your Will to Amnesty International, and be an enduring voice for freedom and justice.



AMNESTY
INTERNATIONAL



Learn more by contacting Hala Al-Madi at 613-744-7667 ext 223 or halmadi@amnesty.ca.

Or check this box to receive more information.

Card
Signature: _____
E-mail: _____
I understand that payments will continue automatically each month unless I cancel my monthly donation at any time, and I have the right to receive any debit does not comply with this agreement, and to obtain more information.

Please return this entire form to Amnesty International

999999999
change
@amnesty.ca. I understand that payments will continue automatically each month unless I cancel my monthly donation at any time, and I have the right to receive any debit does not comply with this agreement, and to obtain more information.
envelope provided. Thank you.

FROM: _____



Thank



Gifts left in Wills to Amnesty International are vital to our human rights work now, and in the future.

To make a donation immediately please choose one of the following options:



MAIL

OR



CALL

1-800-AMNESTY
(1-800-266-3789)

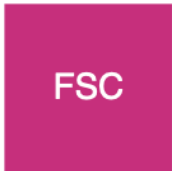
OR



VISIT

www.amnestygift.ca

DM2206





**Covenant
House**
Vancouver



Are you looking for a way to leave a legacy to youth in our community while reducing your taxes? Please consider a gift in your Will to Covenant House Vancouver.

A gift in your Will empowers you to make a lasting impact on the world by providing for your loved ones and the causes that matter most to you. Through your Will, you can continue to walk alongside the young people who turn to Covenant House for support on their journey away from life on the streets towards a brighter future.

For more information please contact:

Celia Campos, Manager—Legacy Giving
Direct: 604-757-6068 Office: 604-638-4438
Email: ccampos@covenanthousebc.org

or visit our website at covenanthousebc.org for information on how to give.



▼ Donate

- Monthly Giving
- Single/General Gifts
- Wildlife Adoptions
- In Memory
- In Honour
- Employer Matching Gifts
- Unique Gifts
- Gift in Your Will

▪ Legacy Giving Information Request Form

▪ Robert Bateman

- Gifts of Securities
- Workplace Gifts
- Weddings
- Birthdays



Your Legacy for Wildlife

Gift in Your Will

Where were you when you first experienced nature? Perhaps it was seeing a painted turtle in a local pond, or the stillness of the woods behind your childhood home. Or the first time you saw the ocean. Where were you?

We are all touched by the beauty of our natural world. At WWF-Canada, we are working to make sure this wonder is not lost. We fight

- Monthly Giving
- Single/General Gifts
- Wildlife Adoptions
- In Memory
- In Honour
- Employer Matching Gifts
- Unique Gifts
- Gift in Your Will
- Gifts of Securities
- Workplace Gifts
- Weddings
- Birthdays
- Donate Your Car
- Fundraising FAQs
- Notes from Our Donors

GOOD ANCESTOR



4 immediate phone calls enquiring about leaving a bequest

A legacy of love



Gwen Brooks' love of animals, and her personal experience of physical disabilities and challenges, has inspired her to make a very special gift to Lions Foundation of Canada Dog Guides program – a bequest in her Will.

Gwen fondly remembers her own dogs, Fiona, a Miniature Schnauzer. And Spanky, her highly energetic Jack Russell. "I loved them both to bits."

In 2000, Gwen's life changed overnight while travelling in Scotland. A sudden and devastating

Legacy Donor PROFILE

stroke left Gwen having to relearn everything – how to walk, how to use her non-dominant hand, and eventually, how to paint again.

The experience left her with a profound understanding of how hard it is to overcome physical disabilities.

"It is my hope that my gift will help provide Dog Guides to those who need them. Animals mean so much in our lives and these wonderful trained dogs will help bring a sense of security and independence, as well as their unconditional love."

If you would like more information on leaving a gift in your Will please contact Julie Jelinek at 905.842.2891 ext. 223 or by email at jjelinek@dogguides.com. Thank you.

Raising superheroes



After a traumatic brain injury led her into early retirement, Linda Kittmer's senior golden retriever gently persuaded her to take up a new passion – playing foster mom for Dog Guide puppies.

As a foster mom, Linda raises puppies from seven weeks of age, until they are ready to head off for their formal training at age one.

She provides the puppies basic training, socialization, many different experiences – and 24/7 love.

"I know several people who, if it weren't for their

Foster Family PROFILE

Dog Guides, would not be able to live on their own," she says. "It's only because they have a working dog that they can have an apartment and have that independence."

To date, Linda has fostered nine puppies. In non-COVID times, she's a dedicated participant in our fundraising projects. And she's puppy-sat more than 50 future Dog Guide puppies.

It's always hard to say goodbye at the end of the year.

"But at the same time, you know they're superheroes that are going to change someone's life. It's all so incredibly rewarding."



Issue 1 | Spring 2022 | www.dogguides.com



The Pawsitivity REPORT

Your Generosity at Work



Our alumni – meet Kesler and WyndSOR

Kesler and his family are enjoying peaceful nights ever since WyndSOR arrived in their lives.

WyndSOR is an Autism Assistance Dog Guide. These special Dog Guides help children between 3 and 12 years old who are on the autism spectrum.

They're a source of safety, companionship and unconditional love.

One of their special gifts is knowing how to provide calming relief for children in high anxiety situations.

For Kesler, night time used to be a time he was really anxious. His mom, Lana, remembers ...

"Kesler used to wake up multiple times a night, and he would come running out of his room screaming."

But this hasn't happened since WyndSOR has come to live with us. Now sleep for the entire family has improved!"



I felt when dealing with the harder times until WyndSOR came along, and gave me a partner in comforting my son.

WyndSOR has the most kind and gentle spirit, and has improved our son's quality of life and mental health in so many ways. He gives Kesler safety, mental health... and has been his very first friend.

Having WyndSOR join our family has been life changing."

We are deeply grateful to all our donors, whose generosity helps bring these special dogs and families together.

WyndSOR recently joined Kesler at the dentist, where he had always previously needed a general anesthetic. This time, with WyndSOR laying on the chair with him, Kesler was calm the entire time.

Lana speaks so eloquently of the impact on their family of having WyndSOR join them. Not just for Kesler – but for her as well.

"I never realized how isolated



Donor to their lawyer:
"I want to do this!"

Go the extra mile by raising funds to right the poverty

Whether you're hosting a yoga-meditation, you the same time.

Arthur Lee ran Ultra in Golden, profound experience with over 4000 for a flat-lander.

I was able to receive support of my Oxfam t-shirt and those that I met.

To start your own for Oxfam and support your Oxfam.

Arthur Lee

ROWENA'S CORNER

"My mom was separated from her family at just ten years old, during the war. People helped her and helped her family, I think she never forgot that.

Oxfam is something that's close to my heart because it's a charity that my parents always supported.

I think the bit that really makes the difference to people's lives is the development work, and empowering people. Just giving them the basic tools so that they can help themselves.

That's something that Oxfam does really well, so when we did our Wills, to leave a little bit to Oxfam feels a very worthwhile thing to do.

My mom said to me, 'If we all help somebody and they help someone, it spreads.'

It's a bit like planting the one seed that grows into more seeds that can be shared with other people."

For information on leaving a gift in your own Will, please contact Rowena at rowena.griffithsoxfam.org or +1-613-627-8634.

ROWENA'S CORNER Samantha's Story

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

I thought about leaving a Will after I had my daughter. I wanted to leave a legacy not just for her, but for other people, and children was the first thing that came to mind. I like the work that Oxfam does to support children.

Setting up a Will through Oxfam wasn't a difficult process at all. It was very straightforward.

I hope that my daughter grows up with a compassionate perspective on the world and that she can pass that on to other people as well. That's very important to me.

Leaving something to Oxfam is my way of giving back to the world."

For more information on leaving a gift in your own Will, please contact Rowena at rowena.griffithsoxfam.org or +1-613-627-8634.

Surviving Drought: Hassana's New Way of Life

Thank you for providing essential support for people struggling to overcome the catastrophic effects of climate change.

Hassana lives in the Somali Region of Ethiopia and knows the daily challenges of the pastoralist life, constantly moving place to place trying to find enough food and water for the animals during times of drought.

Now, with five children, Hassana says, "During the rainy season we would earn a good income and during the droughts we would have a hard time. The worst was five years ago. The drought was a lot of livestock."

With support from Oxfam Canada, Hassana considers herself lucky.

Learned how to plant seeds and set up irrigation channels. We have planted grass to feed our animals. I'm growing peas and onions too. We have harvested a lot.

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

Gifts help pastoralists like Hassana to diversify their livelihoods so their families consistently have enough food and

ROWENA'S CORNER - David Salter - a legacy of fighting injustice and poverty

David became involved in the social justice movement as a teenager. His motivation? Seeing so many people living in poverty in the small town where he grew up.

David has worked for close to 20 years as part of Oxfam's International Programs team.

"Oxfam to me is the hope that individuals from every corner of the world can bring about lasting and positive change."

Inspired by hope, David made the very generous decision to leave a gift to Oxfam Canada in his Will.

"It's important to me to provide what I can to support work that I believe in once I'm gone."

"It's so inspiring and humbling to come into contact with people who, even in the harshest of circumstances, love and care for one another, have hope and work to improve their lives. Seeing this makes it impossible to commit to anything less."

For more information on leaving a gift in your own Will, please contact Rowena at rowena.griffithsoxfam.org.

Where We Work

BEHIND THE WORLD, BEYOND WORDS, THE POWER OF PEOPLE AGAINST POVERTY

OXFAM CANADA OXFAM INTERNATIONAL OXFAM GREAT BRITAIN

OXFAM FOR CHANGE Pg. 8



Image description: The marquee of the Stanley Industrial Alliance Stage at night, with text that reads Take a Leading Role. Celebrating Legacy Giving, Fall 2021.

Dear Harvey and Marcia,

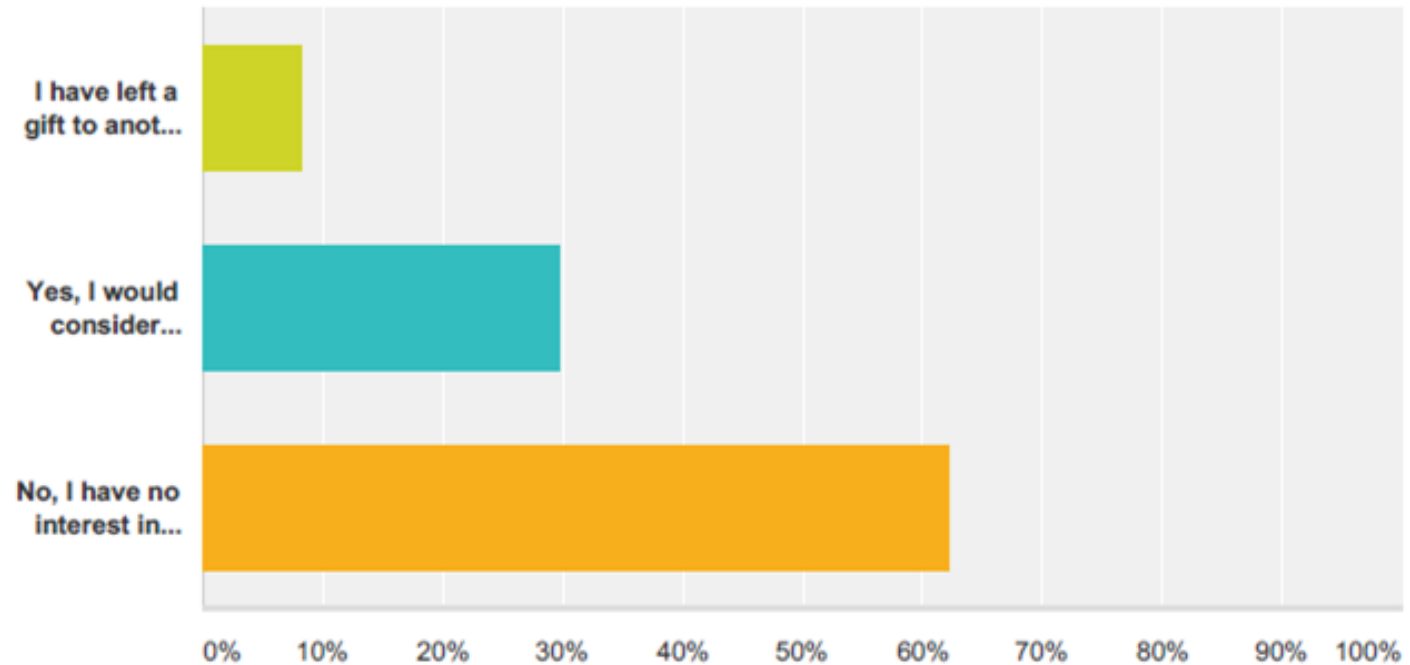
We are thrilled to be bringing you our fall newsletter, Take a Leading Role. Legacy giving is such an important program to the Arts Club and we are humbled by the growth of our Legacy Circle over the last several years. We are honoured to know that so many patrons have been touched by our productions over the years and we appreciate that they are making plans to be part of our

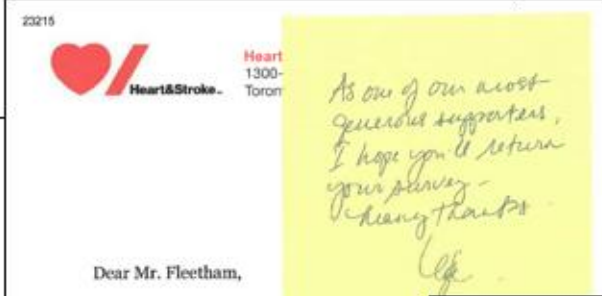


**OUR MEMBERS ARE NOT THE KIND OF GUYS
WHO LEAVE GIFTS TO CHARITY IN THEIR WILLS!**

Q26 You may already know that one of the best ways to support an organization you care about is to leave a gift in your will. Would you consider leaving a gift for the Steelheaders in your will?!

Answered: 251 Skipped: 45





Dear Mr. Fleetham,

It's hard for me to say how important your generosity is to heart and stroke research. But please let me try.

You are one of our most committed supporters. You have made a phenomenal difference in heart research. Fewer people die from heart disease today, thanks to research funded by caring people like you.

That's why today I'm writing you to ask for a small favour.

I'm not asking for a donation today. I'd like to ask for your opinions and if you would consider a special gift in the future. Your survey answers provide valuable insights to help find more people with caring values that you have.

Mr. Fleetham, you likely have a very good reason for supporting the Heart & Stroke Foundation. Perhaps you have a story like mine.

About 2 years ago my Mom passed away

- 4 -

consider naming the Heart & Stroke Foundation's Will - I can tell you that it is a wonderful way to help.

Your survey responses will give us valuable insights into why you support our work. We'll find more people that have the same caring values you do. Thank you in advance.

Me and my Mom, Mado

With my warmest regards,
Yves Savoie

P.S. Mr. Fleetham, it will only take you a few

23215 PLEASE RETURN BY APRIL 30th

CONFIDENTIAL SUPPORTER SURVEY 2018

Mr. Doug Fleetham i8-PGSUR1-SD-T-MI SEEDHMA3

Dear Mr. Fleetham,

I invite you to participate in Heart & Stroke's 2018 supporter survey.

Your answers are important and will be completely confidential. Thank you in advance for your generous time.

Yves

Section 1: Your views on Heart Disease and Stroke

1. Which areas of Heart & Stroke are you most interested in?

Research Prevention
 Support for: Other (please explain):
 Stroke Survivors _____
 Heart Disease

2. Heart & Stroke has six critical research priorities. Which ones are important to you? (Feel free to check your top 3.)

Stroke Heart Rhythm
 Heart failure Vascular Cognitive Impairment
 Structural Heart Disease Coronary Artery and Vascular Disease

3. Would you like to receive more information on:

Our research Ideas on how to maintain a healthy lifestyle
 How to prevent stroke Other (please explain):
 How to prevent heart disease _____
 Caring for _____
 Heart attack survivor _____
 Stroke survivor _____

Please turn over ➡

children's
HEALTH FOUNDATION
OF VANCOUVER ISLAND

2390 Arbutus Road, Victoria, BC V8N 1V7
250-519-6977 | islandkidsfirst.ca
Charitable registration no. 898638291880001

Our Promise...



to the children of
Vancouver Island

You can help future
generations for years to come.



Canadian
Cancer
Society

BRITISH COLUMBIA AND YUKON

Let's Make Cancer History
1 888 700-1131 | www.cancer.ca

Imagine if...

Future generations
never feared cancer.



Imagine if...

Your gift helped
make it happen.

THE OPPORTUNITY: Digital and Legacy Giving

- Legacy donors are values-driven, not channel-driven
- 4 out of 5 bequest donors never tell the charity
- Digital allows us to reach silent legacy prospects
- Social ads can introduce legacy giving earlier



Lions Foundation of Canada Dog Guides

Order your FREE will making kit. Change a future.

A Gift for you...

Get your FREE will making kit and luggage tag! Click here to download your will making kit. [Learn more](#)

4

Like Comment Share

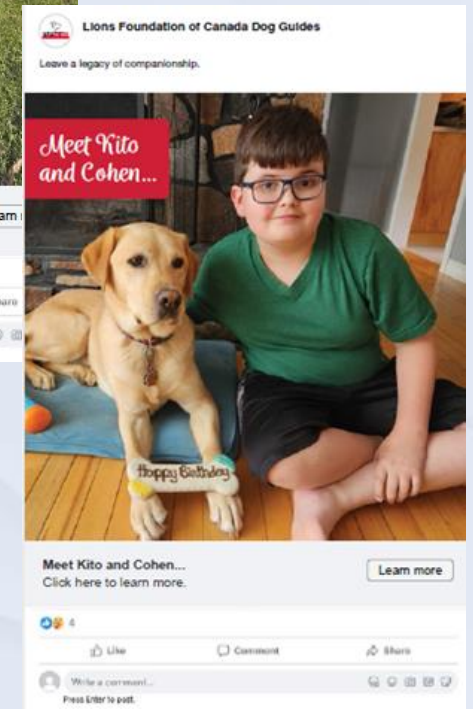
Write a comment...
Press Enter to post.

The image shows a Facebook post from the Lions Foundation of Canada Dog Guides. At the top, the profile name and logo are visible. Below that is a headline: "Order your FREE will making kit. Change a future." The main visual is a photograph of a light-colored puppy wearing a green vest with the "DogGUIDES" logo and the text "FUTURE DOG GUIDE". A red text box in the upper left of the photo says "A Gift for you...". Below the photo, there is a call to action: "Get your FREE will making kit and luggage tag! Click here to download your will making kit." with a "Learn more" button. The post shows 4 reactions and a comment section with a "Write a comment..." field and a "Press Enter to post." prompt.

THE CHALLENGE:


Finding new Legacy Leads

- Legacy program already in place
- Mail and newsletters were working, but limited to a small donor base
- Key question: Can digital ads find new legacy prospects?
- Goal: awareness + lead generation



THE SOLUTION: A Digital Legacy Campaign



Receive your digital will kit today! 


Now and Tomorrow, A Dog Guide's Journey... Starts with You!

Please enter your information below to receive your digital will kit.

Name*

Email*

Phone*



Provide your mailing address too and we will send you a printed copy of your will kit and a **FREE** luggage tag!

Street Address*

Contact*

 About Us ▼ Get a Dog Guide ▼ Get Involved ▼ Donate ▼ Contact



Gifts in wills from supporters like you will one day provide a Dog Guide to someone in need. A Dog Guide can:

- Safely guide a person who is blind or visually impaired;
- Alert to sounds by touching with their nose or paw for someone who is deaf or hard of hearing;
- Assist and support a child who is on the autism spectrum;
- Give the gift of independence and safety to a person who has a physical or medical disability, epilepsy or diabetes;
- Provide support for children dealing with or who have experienced trauma.

Click the link below to download your digital will kit. If you've included your mailing address your printed will kit and **FREE** luggage tag will be arriving in the mail shortly.

Download your digital will kit here! 

Now and Tomorrow, A Dog Guide's Journey... Starts with You!



THE RESULTS:

Quality Leads at Scale

- **359** legacy leads in one month
- Cost per lead= **\$6.49**
- **58,000** people reached
- Most successful legacy initiative to date



FROM LEADS TO LEGACY DONORS

- Identified new and existing donors interested in legacy
- Created permission-based follow-up
- Built long-term relationships
- Digital is flexible, scalable, and staff-friendly



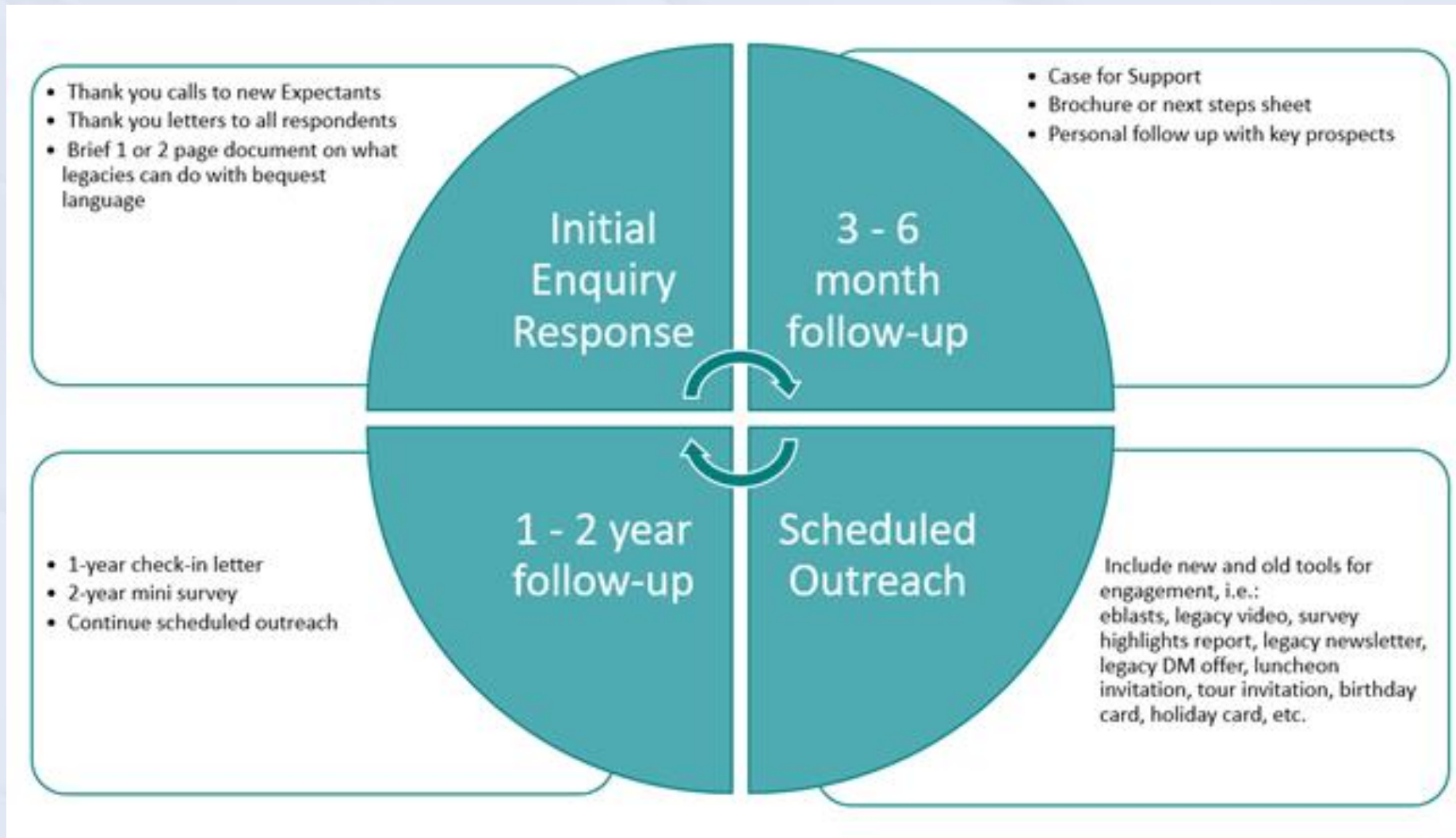


ONGOING CULTIVATION & CONVERSION

So, they're considering — now what?

- Often, organizations invest in generating awareness, and ideally interest — but they don't necessarily have a long-term plan for cultivation of that interest
- Personal cultivation only goes so far (many won't want to meet, and you can't do it at scale)
- Moving people from interest to action is a crucial part of a successful legacy giving program

Keep the conversation going



YOU
MAKE GREAT THINGS
POSSIBLE.



**Your local community,
and communities across Canada and around the world,**
need more highly trained leaders who are empowered to tackle
the world's complex challenges.

When you think about your impact
in the world, and what you believe
is important for the future – you
can show *you believe* in empow-
ering people through an applied
education – to improve lives, in-
spire progress, and transform our
communities for a better future.



BE A BELIEVER IN A BETTER FUTURE.
Together, we will improve lives, inspire progress
and transform our communities.

**You have the power to impact
generations with a Gift in your
Will to the BCIT Foundation.**

When you invest in the future of BCIT, you provide
opportunities for future students to access a leading
applied education. Learning with the most advanced
technology and tools, they will be ready to find
solutions to the world's most urgent challenges and
create a brighter future for everyone.

**IF YOU BELIEVE IN A BETTER FUTURE,
PLEASE CONSIDER CREATING A GIFT
IN YOUR WILL TO THE BCIT FOUNDATION.**

Legacy Case for Support (aka Brochure)

Focus on why, not how

Yes! I'm a big believer in BCIT!

- I want to make a difference for the future, and have already included a gift in my Will for the BCIT Foundation.
- I am committed to supporting the future leaders we'll need in this complex world, and would consider a gift in my Will.
- I support the important work BCIT does but I'm unsure about creating a gift in my Will at this time.
- I'd like to know more. Please send me additional details.

Name: _____

Address: _____

City: _____ Postal Code: _____

Phone: _____

Email: _____

Be assured, we value your privacy, and we never share or sell your contact information.

Helpful Planning Aids

“Next steps” sheets, family convo guides



Thinking of creating a gift in your Will?

A legacy gift, such as a gift in your Will, is an enduring statement about the values that you hold dear. When you create a gift in your Will to Heart & Stroke, you share your hope, support and vision of a future free of heart disease and stroke. You make a truly incredible gift benefiting friends, neighbours, loved ones and future generations of Canadians.

Do you want to help create a healthier future?

Every legacy gift to Heart & Stroke – whether large or small – has an impact on the lives of people just like you. It means so much that you are considering a gift in your Will, and we are honoured to hold such a place in your heart. Know that a legacy gift to Heart & Stroke is a gift for a healthier future. It is a gift of life.

Here are answers to some common questions about creating a gift in your Will for Heart & Stroke.

Concerned you might not have enough to provide for a gift in your Will?

Sometimes, people are unsure whether they will have enough to provide for their loved ones and create a legacy gift for the future. If this is a concern for you, there's a way to make sure your loved ones receive what you intend and fulfil your charitable wishes.

A **residual gift** can be made from what is left of your estate *after* all debts and specific gifts to loved ones have been paid, and it may be the best option for you. You receive a charitable tax receipt for the full amount of your gift which may be beneficial to your loved ones when applied to the tax filings of your estate.

Some choose to give all the residue of their estate to the cause they care about. Others imagine Heart & Stroke as an additional loved one and divide the remainder between the people and charities they wish to support.

Whatever you choose, your gift will make a difference for research, support, and care for those affected by heart disease and stroke.

Sample wording for a residual gift of the full balance of what is remaining:

To pay and transfer the residue of my estate to Heart and Stroke Foundation of Canada – Charitable Registration # 10684 6942 RR0001.

Sample wording for a residual gift of a portion of what is left of your estate:

*To pay and transfer _____ of the residue of my estate to Heart and Stroke
of parts, %, or share
Foundation of Canada – Charitable Registration # 10684 6942 RR0001.*



Heart and Stroke Foundation of Canada – Charitable Registration #: 10684 6942 RR0001

This material provides general information and is not intended to constitute or replace specific professional advice. Donors considering a legacy gift should speak to an advisor with appropriate tax and other expertise to implement a strategy that achieves their objectives.

Survey Follow-Up

Share results to build social norms



Values & Viewpoints

Supporters of Union Gospel Mission have strong values and a deep commitment to helping others, and we believe it is important to understand what is most meaningful to our community. So every year, we survey rising donors like you to learn about their values, and what they believe is most vital about UGM's work. Values & Viewpoints provides insights from the year's survey back to you -- a member of this compassionate community of supporters helping to transform lives.

For those of you who took the time to offer your thoughts and feedback, we are deeply grateful. *Your voices are heard and appreciated.*

If you have not yet seen a survey in your mailbox, you may be selected for next year's supporter survey! Watch for your chance to tell us what is important to you--we'd love to hear from you.

And now, we are pleased to share the key findings from this year's survey.

97% believe in the importance of UGM's mission to transform communities by overcoming poverty, homelessness and addiction—one life at a time.

89% recommend, or would recommend, supporting UGM's work to family or friends.

Number of years since last time completed survey	Percentage
0-1 Years*	24%
2-3 Years	7%
5-10 Years	20%
10+ Years	49%

*Number of years since last time completed survey

Newsletter Articles

Doesn't have to be legacy donor story!

Check-In Letter/Email

Low-pressure follow-up to see where they're at

Annual Report

Feature legacy revenue and long-term importance
or, donor story or supporter listing



Dear Loyal Friend,

Thank you for your continued support of our mission. Your heart for this community means each day men, women and families can overcome poverty, homelessness and addiction.

You are invited to join us at an event for special long-time donors like you who already have, or at one time indicated they would consider, creating a lasting legacy to Union Gospel Mission.

This annual event hosts a number of speakers from across UGM, providing updates and exciting plans for the future – some that have not yet been shared with most donors! A fantastic meal prepared by our own chefs follows the program, as well as an optional tour of the Hastings facility at 1:00pm.

There is no obligation, and you will not be asked to donate at the event – *we would just love to have you attend.*

Sincerely,

Keisha Knight

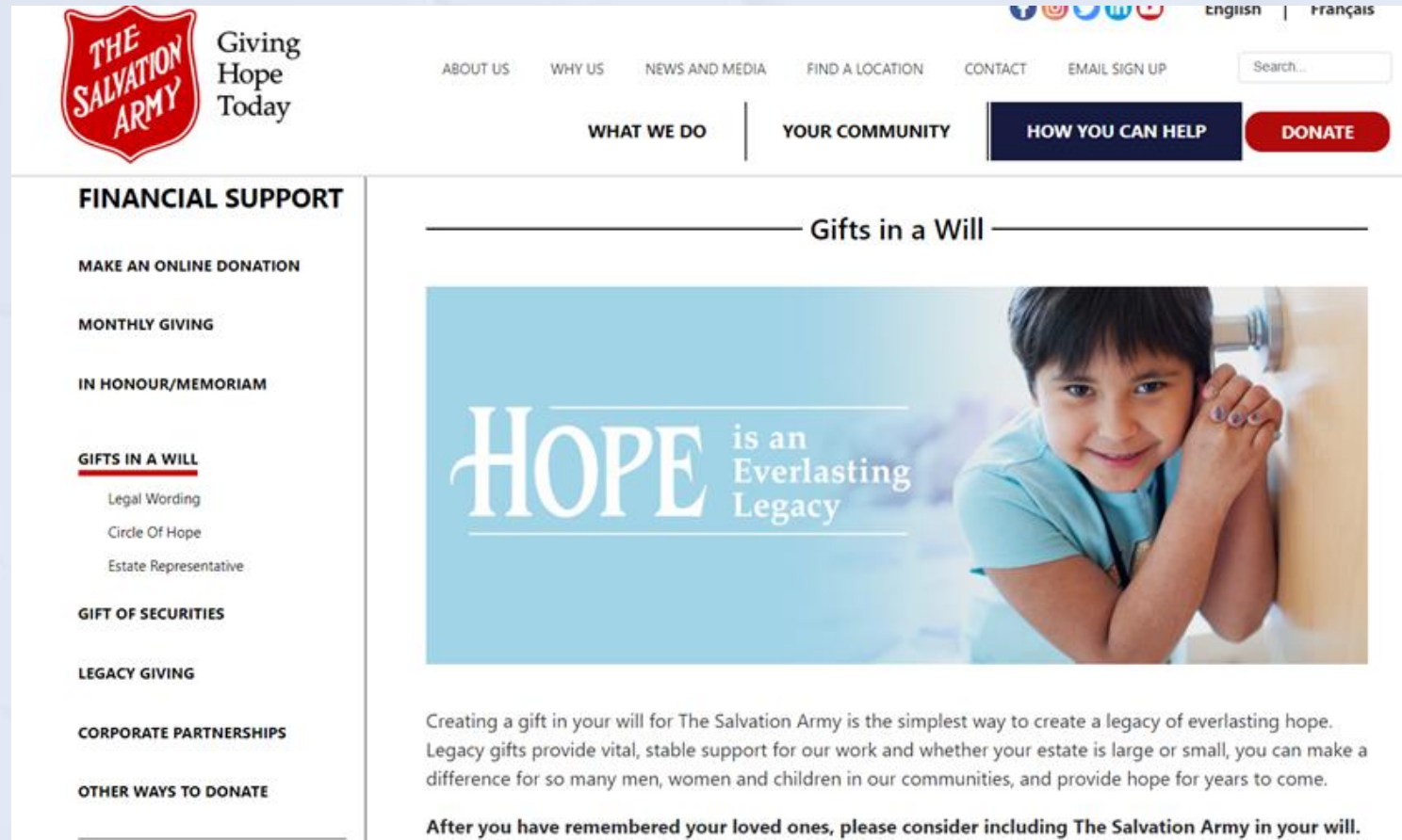
Development Officer, Legacy Giving

Events/Tours

Mix confirmed expectants with new prospects

Digital Presence

Use website, e-blasts, social, GoogleAds, video storytelling



The screenshot displays the website for 'Giving Hope Today' by The Salvation Army. The header includes the organization's logo, navigation links (ABOUT US, WHY US, NEWS AND MEDIA, FIND A LOCATION, CONTACT, EMAIL SIGN UP), a search bar, and social media icons. A secondary navigation bar highlights 'HOW YOU CAN HELP' and 'DONATE'. The main content area is titled 'Gifts in a Will' and features a large image of a smiling child with the text 'HOPE is an Everlasting Legacy'. Below the image, a paragraph explains the benefits of creating a gift in a will, and a bolded sentence encourages users to include The Salvation Army in their wills.

THE SALVATION ARMY Giving Hope Today

ABOUT US | WHY US | NEWS AND MEDIA | FIND A LOCATION | CONTACT | EMAIL SIGN UP | Search...

WHAT WE DO | YOUR COMMUNITY | **HOW YOU CAN HELP** | **DONATE**

FINANCIAL SUPPORT

- MAKE AN ONLINE DONATION
- MONTHLY GIVING
- IN HONOUR/MEMORIAM
- GIFTS IN A WILL**
 - Legal Wording
 - Circle Of Hope
 - Estate Representative
- GIFT OF SECURITIES
- LEGACY GIVING
- CORPORATE PARTNERSHIPS
- OTHER WAYS TO DONATE

Gifts in a Will

HOPE is an Everlasting Legacy

Creating a gift in your will for The Salvation Army is the simplest way to create a legacy of everlasting hope. Legacy gifts provide vital, stable support for our work and whether your estate is large or small, you can make a difference for so many men, women and children in our communities, and provide hope for years to come.

After you have remembered your loved ones, please consider including The Salvation Army in your will.

Re-Survey at 2-Year Mark

Keep updated on donor intentions



Your Voice is Valued

You were one of our very special donors who responded to a select survey about 2 years ago, and we hope we can call upon you to share your time and thoughts with us once again as we seek to more deeply understand what is important to you, and supporters like you.

By better understanding why UGM and the work we do is meaningful to you, we become better able to communicate what is really important to you, as well as those who may feel similarly.

Thank you for taking a moment to help in this very valuable way.

Legacy Giving is a Long Game

- On average, it takes 2 – 3 years or more for a supporter to go from considering a legacy gift to actually having made it
- Having a time-based, repeatable, specific flow of communications helps keep top of mind so that when a supporter is actually making updates to their plans – they remember you!

Thank you!

Any questions?

Lynne Boardman

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**Book a 30-minute chat
with me at:**

**[globalphilanthropic.ca/experts/
aimée-lindenberger/](https://globalphilanthropic.ca/experts/aimée-lindenberger/)**