



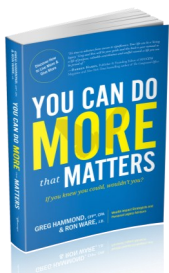
12 LEGACY CONVERSATION STARTERS

Simple, effective questions you can ask donors and prospective donors to develop this important conversation:

These questions help people to begin thinking differently and dispel any misconceptions they may have on this subject. Ultimately, with just a bit more thought and care, development professionals can guide and counsel donors in ways that encourage and empower them to get into a game they do in fact care about, but never really thought they could afford to play.

1. If you knew you could afford to give more to causes and organizations you personally care about, without compromising your financial independence and lifestyle, would this be interesting and potentially valuable to you?
2. Are you aware that in most circumstances, when you leave money to charity through your estate or trust, it does not have to reduce your family's share?
3. Would you prefer to take the portion of your money that otherwise would be paid to the government in taxes after your death, and instead, redirect those assets to your personally chosen causes and organizations?
4. What is your story? (Parents, childhood, most painful and joyful memories, how did you meet your spouse, kids, vocation)?
5. Why do you want to leave money to your children?
6. What was the most meaningful gift you ever made and why?
7. What causes and organizations do you currently give to and why?
8. Do you serve in any board roles on behalf of nonprofit or charitable organizations? If yes, what led to your decision to give of your valuable, and if you're like me, incredibly scarce, time to that cause or causes?
9. What would you describe as your top 3 talents?
10. What values do you hope to pass on to future generations?
11. What relationships, opportunities, and experiences are you most grateful to have had?
12. Have you provided in your estate plan for any substantial gifts to particular causes and organizations you care about?

Did you know that many of your donors and prospective donors are waiting for you to raise the topic of charitable giving? Wouldn't it be mutually beneficial – to you and to them– if you could prompt an engaging and productive conversation about legacy planning and philanthropy? Wouldn't this add immeasurable value to your organization?



You Can Do More That Matters is filled with advice and examples designed to help people "LIVE MORE and GIVE MORE." Read it for yourself and offer copies to your donors. You can inspire them to think differently about their wealth and motivate them to take action on behalf of the causes and organizations they care about most.

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