IT'S YOUR CONFERENCE

FIA CONFERENCE 2022

YOUR **PASSION** ○ YOUR **PEOPLE** ○ YOUR **PLACE**

FIA CONFERENCE

Gifts in Wills Conversations: The Who, What, Why, Where and When

GIFTS IN WILLS

ASHLEY ROSE, FFIA – MONDIAL TELEPHONE FUNDRAISING

JAKKI TRAVERS, FFIA – THE SMITH FAMILY

SPONSORED BY

gatheredhere
FREE ONLINE WILLS

FIA CONFERENCE

Gifts in Wills Conversations:
The Who, What, Why, Where and When

First Commandment:

Bequests aren't Scary

They're just another way of giving; a way that you can continue to support a charity you have cared about during your lifetime - after your death

Gifts in Wills Conversations:
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First Commandment:

Bequests aren't Scary

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Second Commandment:

"Fundraising isn't something we do to people, it's something we do with people. Friend-making comes before fundraising. Fundraising is not selling. Fundraisers and donors are on the same side".

Ken Burnett

Gifts in Wills Conversations:
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Talking is Perspective

Gifts in Wills Conversations:
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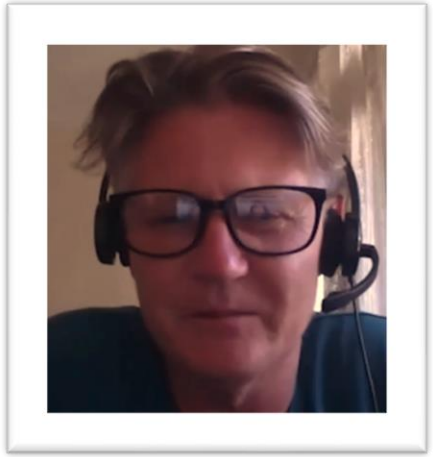
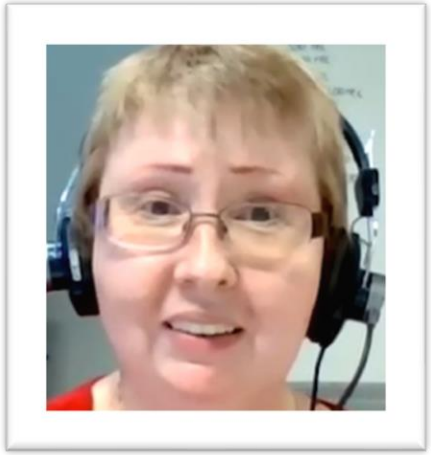
Meet Tim
Beth &
Greig





YOUR **PASSION** ○ YOUR **PEOPLE** ○ YOUR **PLACE**

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Gifts in Wills Conversations:
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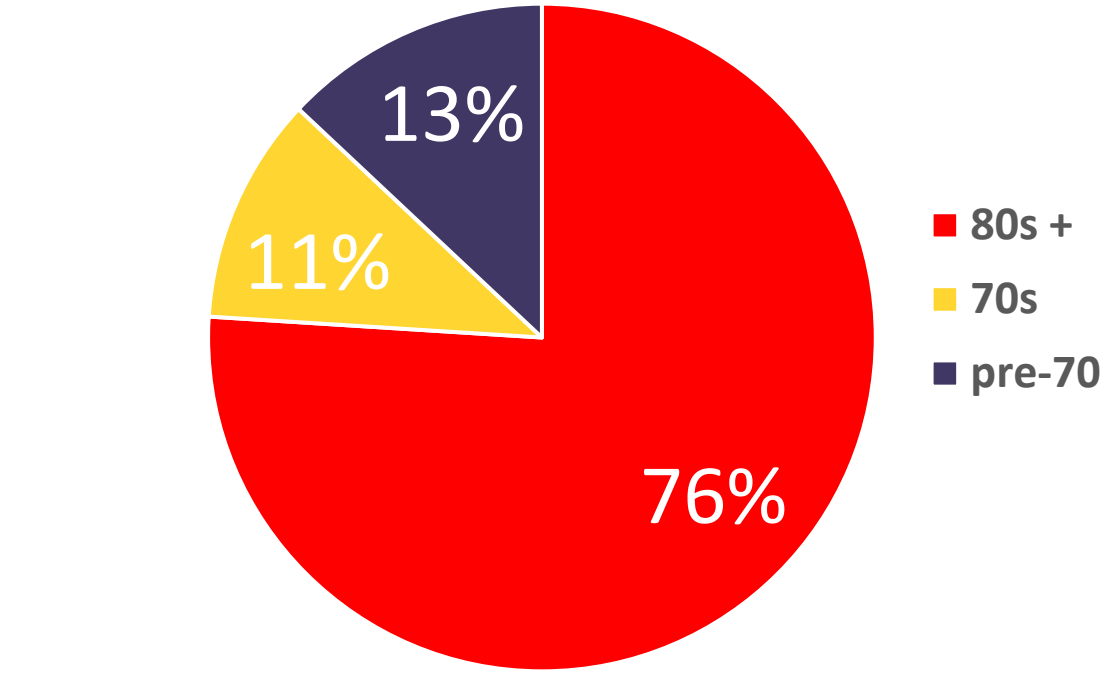
Who

Gifts in Wills Conversations: The Who, What, Why, Where and When

Who

It's about decisions made near the end of life

A national sample of Australian wills found that 76% of charitable bequest dollars were controlled by will documents signed at age 80 or older



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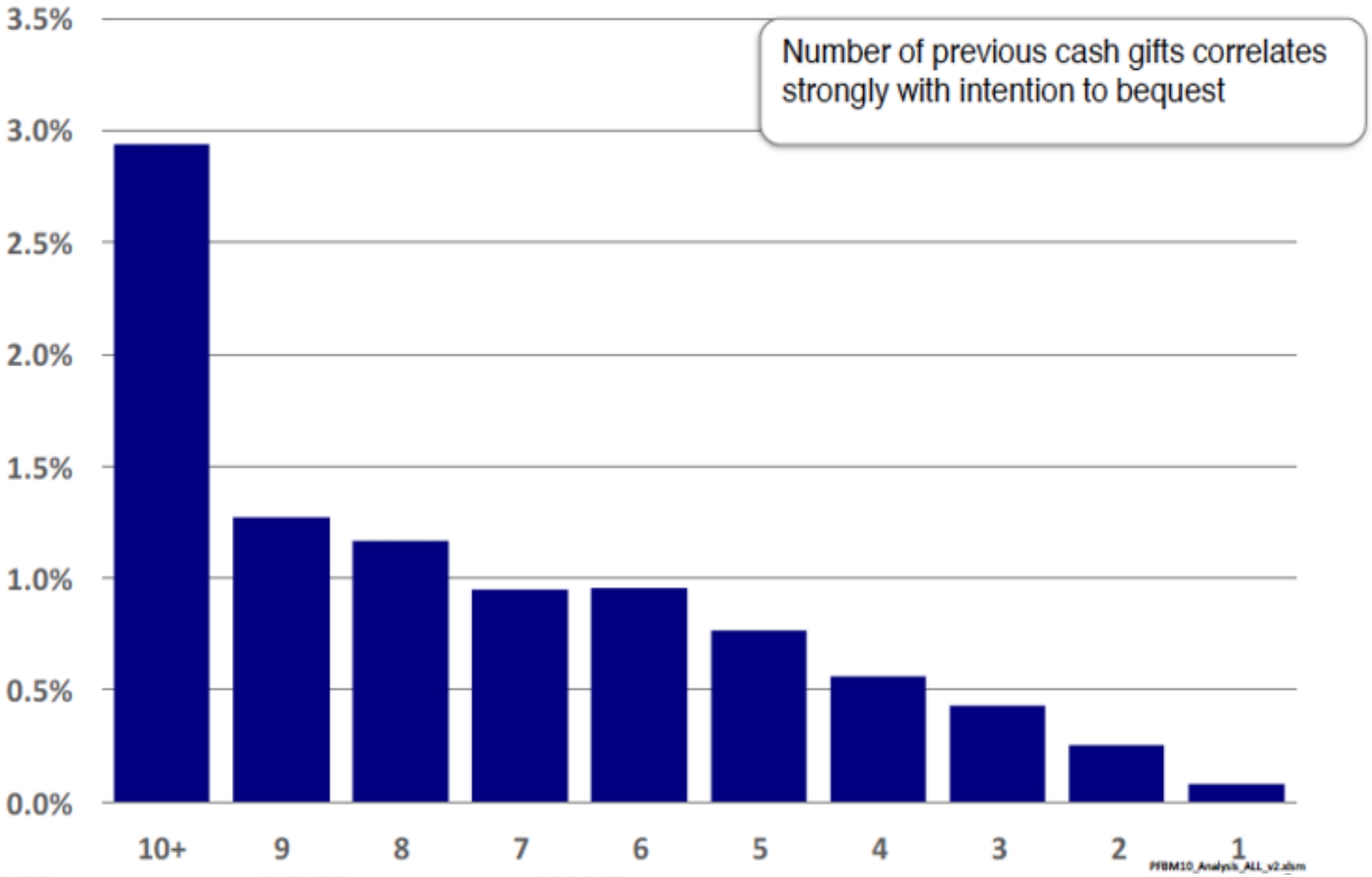

Pledged Bequest rate
by type of support

Pledged Bequest rate
by recency of cash gift (months)

Pledged Bequest rate
by number of cash gifts

nors

Gifts in Wills Conversations:
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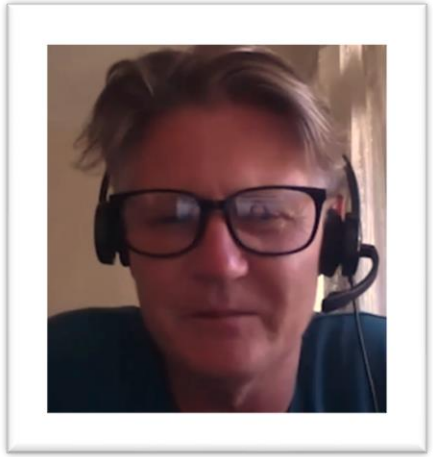
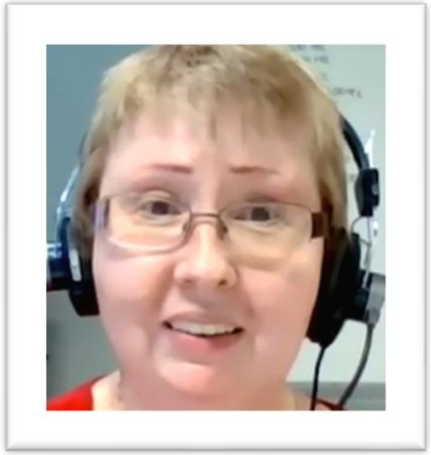
Who
are we
speaking with?





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Who

Segmentation

- Single Givers 10+ gifts
- Single Givers who have given >$1,000
- In Memorium donors
- Active RG
- Active Sponsors
- Bequest Prospects *
- Age 55+

Gifts in Wills Conversations:
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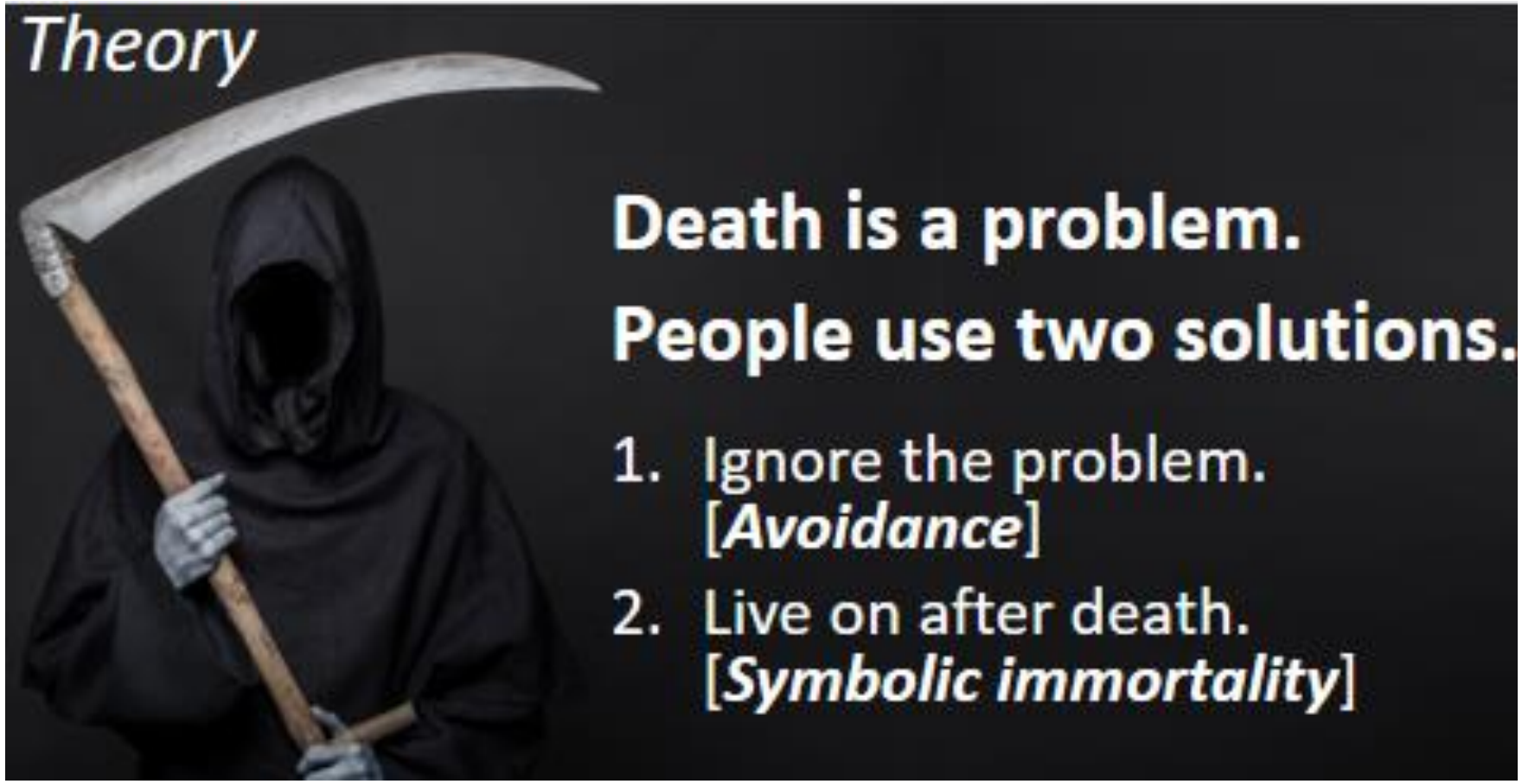
What



Gifts in Wills Conversations:
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What

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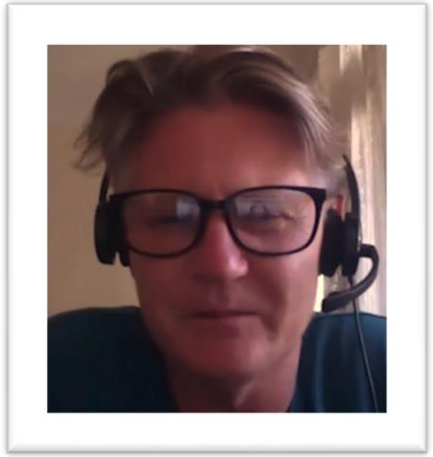
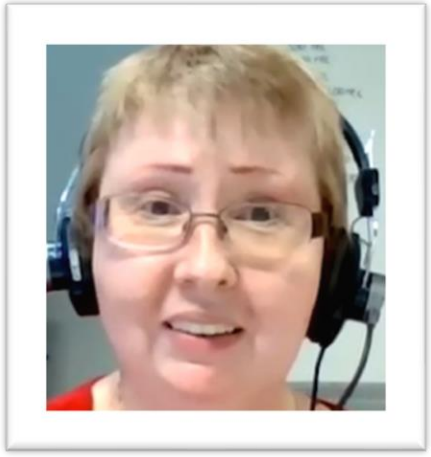
What
is the best
approach?





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What

Include a gift in your Will to change the lives of Australian children in need.

Leaving a gift in your Will is a wonderful way to ensure that Australia's most disadvantaged children have the support they need for school, so they can build a better future for themselves.

THE SMITH FAMILY
Rev.1 Date 15/02/2022 – Gift in Wills - Call Guide

The Smith Family
Rev.1 Date: 15/02/2022 – Gift in Wills

Good morning/afternoon/evening. May I speak with Mr/Ms _____ please?

My name is _____ and I'm phoning from MonDial on behalf of The Smith Family. I hope you don't mind my phoning you at <<home / on the mobile / directly>>, but it gives us an opportunity to have a chat with people who've supported our work. I'm not after a donation today so it's not a fundraising call; if you have a few moments to speak?

If yes: Thank you. I'll be as brief as I can, and I should let you know this call will be recorded for training and quality purposes but more importantly...

If no: Perhaps I can call back another time?

Not so long ago you made an incredible decision to support The Smith Family; to help disadvantaged Australian children to get the most out of their education, so they can create better futures for themselves. I wanted to tell you that your very kind support hasn't gone unnoticed and it is very much appreciated.

I'm also calling because we sent you a story last month, from my colleague Jakki Travers. It outlined the stories and the lives of children who've changed through generosity of people like you? Hopefully you recall it? The story outlined a very special way we're hoping to end poverty in Australia by asking our supporters to consider leaving a gift in their Will to The Smith Family. I wondered if you received it? <*Fundraiser to tailor response accordingly*>

CASE FOR SUPPORT

CREATE A BETTER FUTURE – *Teresa & Rhiannon*

The kind of support that you've shown has changed children's lives and is helping to create a better future for Australian children in need.

Right across Australia growing up poor as a child means missing out on a lot of things. I'm not sure if you recall the letter, we recently sent you from Teresa, concerning her granddaughter Rhiannon? But family circumstances meant Teresa took her granddaughter in. Rhiannon had grown up without all the things she needed to thrive. Her confidence was at rock bottom and her reading was several years below her classmates and she'd been picked on.

Teresa saw firsthand the impact from generosity like yours. Rhiannon got a Smith Family sponsor and it meant the world to her. Simply things like new pens and stationery meant such a lot. Combined with the Smith Family Learning for Life program at Rhiannon's school; things really started to change. In little over a year Rhiannon went from bottom of her class to the top. I'm sure you can imagine how she began to bloom.

Many supporters like you have made a commitment to help end poverty in Australia. Like us, I'm sure you agree this can happen through the power of education. For over 90 years The Smith Family has been helping turn the tables for disadvantaged Australian children – just like Rhiannon.

I know that you've already supported young people through The Smith Family with your gifts to date, and I wonder if you would consider leaving a Gift in your Will to The Smith Family so future generations are not held back by poverty, and like Rhiannon they can begin to thrive.

GIFT IN WILLS ASK

I do understand it is a deeply personal decision to make – but I do know from the many supporters we've spoken with who have done just this, they've been delighted with their decision to make such a lasting difference.

Would you mind me asking if leaving a gift in your will is something you would consider?

< If yes – go to YES TO CONFIRMED, INTEND BEQUEST, BEQUEST ENQUIRY>

<If No – Offer an appropriate response to the supporter's and continue to REFUSED BEQUEST >

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What

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Why

Gifts in Wills Conversations:
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Why do Gift In Wills Conversations resonate?

Social Norming

Gifts in Wills Conversations:
The Who, What, Why, Where and When

Why do Gift In Wills Conversations resonate?

Arun's s Story – A Gift to Shape A Nation

Through no fault of their own, thousands of children are impacted through the disadvantage of poverty. Commitment like yours impacts the future for children who would otherwise go hungry, have to work instead of going to school, lose their families because of violence, or who might be left out; just because they are girls

The hardships children can face were no stranger to Arun. Originally born in India, Arun considers himself lucky to have made a new life for himself in Australia. Arun grew up surrounded by poverty. Arun and his wife came to Australia in 1998 and it took many years and a lot of hard work, for him and his wife to slowly prospered.

Support for our work really transforms lives of children we can reach. It is why Arun decided to sponsor a child in India with Plan International. Arun also believes education is the key to solving poverty. Arun told us he "wanted to give something back to better the lives of kids already on the planet."

Arun chose to support Plan International because he knew we were active in India and he wanted to help the kids there. Now Arun is in a fortunate position where he can give something back as a committed donor himself. We recently learned that Arun and his wife are leaving a portion of their estate to Plan International Australia; which is incredibly generous legacy.

For more than 80 years and working in more than 75 countries; we've helped disadvantaged children living in circumstances not to dissimilar to Arun's childhood. From our years of experience and research we know that supporting a child's education is the best way to support them to overcome the cycle of poverty their families have suffered.

I know that you've already supported young people through Plan International with your gifts to date, and I wonder "Have you thought about how a gift in your Will can help children around the world?"

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Why

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Where

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Where

Identity preface examples

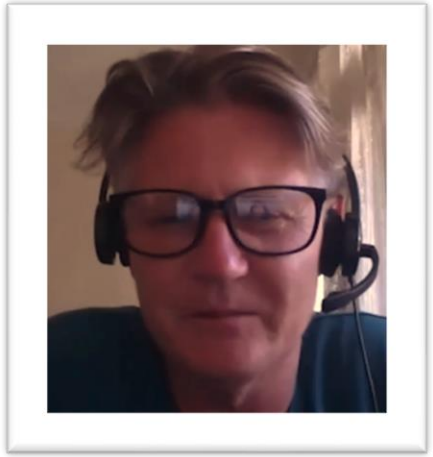
"Thank you so much for all your support for so many years – we truly appreciate it. Donors like you who have supported us for so long often include a gift in their estate plans. I'd love to say thank you for that as well if you've done so. Have you included us? Have you considered it?"

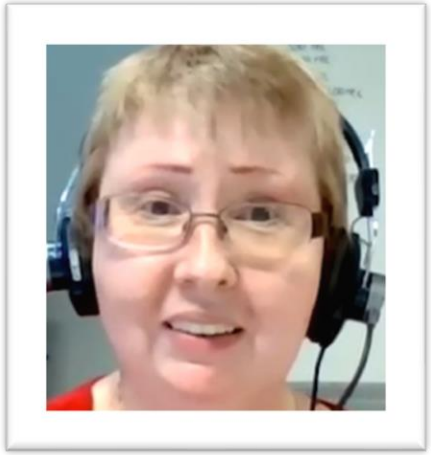
-Jason James Shuba, University of Illinois Foundation

Shuba, J. J. (October 2020). *Navigating planned gift conversations with your donors.* Presented at National Charitable Gift Planners Conference. p. 2.

Gifts in Wills Conversations:
The Who, What, Why, Where and When

Where are you calling from and does it matter?





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When

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Ken Burnett

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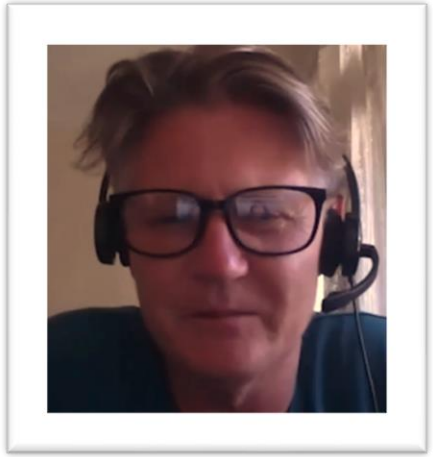
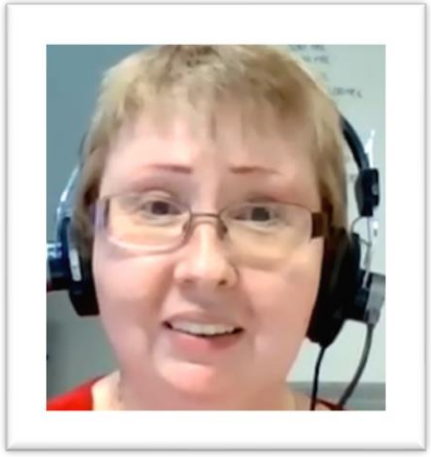
When having a conversation what matters most?





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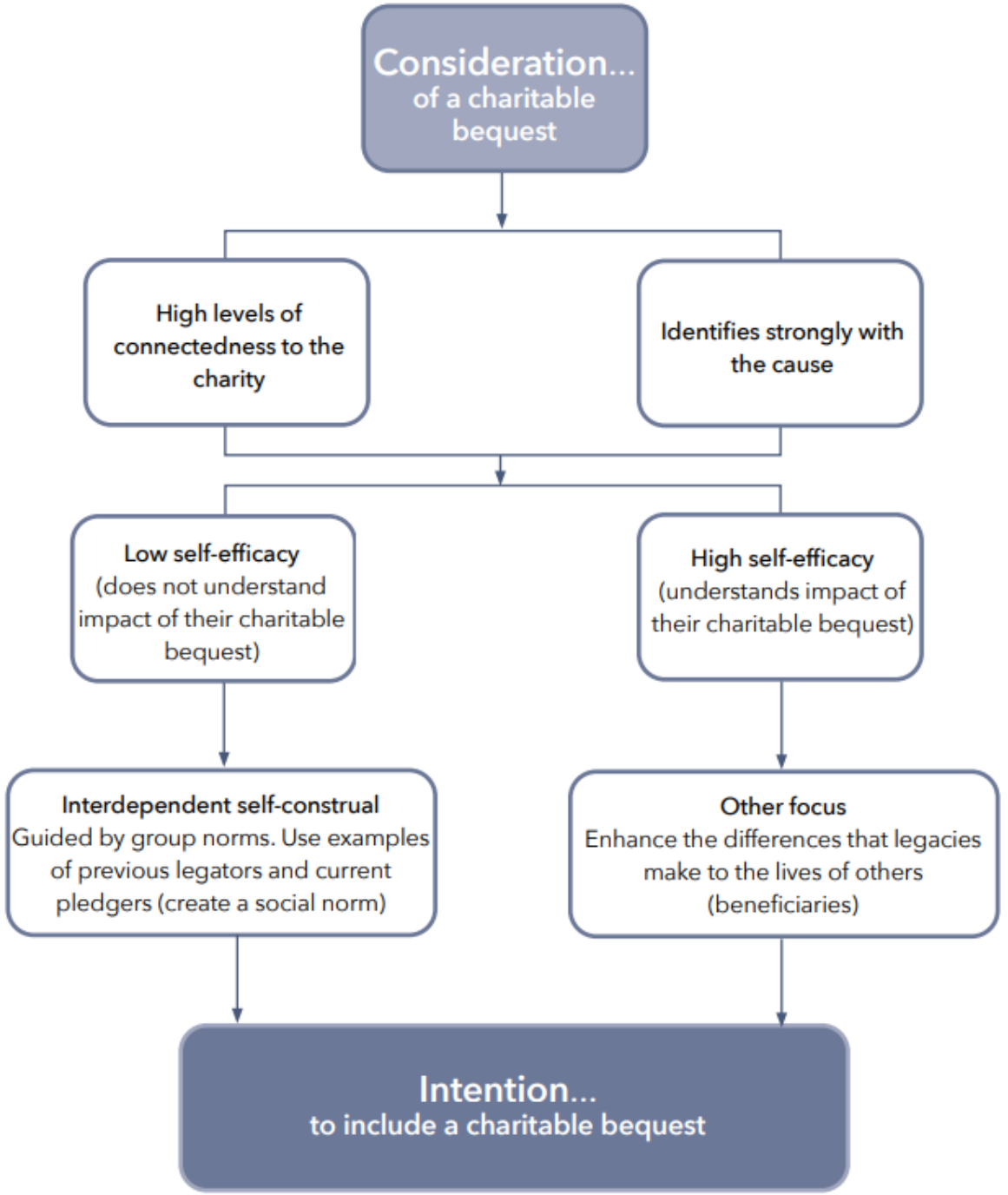
Conclusion

Further confirmation of Compassionate Conversations being right

Model of key psychological factors influencing the legacy journey

Dr. Claire Routley



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Conclusion

- Bequests aren't scary
- Every donor should have the opportunity to hear about Gifts in Wills

- You have the right to ask your donor "*would you consider leaving a Gift in your Will*", and
- Bequests cost nothing today, but will change lives in the future

Gifts in Wills Conversations:
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Q & A time

Acknowledgments:

- Dr Russell James
- Christopher Hall
- Dr Claire Routley
- Dr Adrian Sargeant
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- Greig White, Mondial
- Tim O'Driscoll, Mondial

THANK YOU

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