

Charitable Conversations

IMPORTANT TIPS FOR YEAR-END DONOR CALLS

Charitable-minded people are making year-end gifts. Identify your point person who can facilitate non-cash gifts, and have a .pdf of instructions for stock gift transfers, bequest language, etc., that you can offer donors. While you're having your year-end conversations with donors, here are tips to keep in mind:

Gifts of Stock

Appreciated stock is a smart way to make a gift, but many donors don't know this is an option.

How this may come up in conversation: If the donor is inclined to make a gift larger than \$500, consider saying:

"May I ask you something? Some people donate stock. Would you like more information about that?"

If they say, "I didn't know that" or "I'd never considered that," offer *"I'll make sure you get more information"* and give their contact info to your point person, who can follow up with instructions.

If the donor asks questions about stock, simply ask if they'd like a follow up call with your (point person).

Direct IRA Gifts

Donors 73 and over MUST take a required minimum distribution (RMD) from IRAs, and can satisfy this with a charitable gift.

How this may come up in conversation: When you know the donor is older, consider:

"May I ask something? Some people make a direct donation to charity from an IRA. Have you heard of this?"

If they answer *"yes, but I've never done that"* or *"I had no idea,"* let them know this is an option.

While donors age 70 ½ to 73 don't need to take RMD's yet, they're still eligible to make donations from an IRA. The gift itself is called a Qualified Charitable Distribution (QCD). Tell them you can email a pdf with instructions, and/or ask if your point person can follow up.

Bequests

People from all walks of life leave gifts to their favorite nonprofits in a will, trust, or other estate plans.

How this may come up in conversation: Actually, all you have to do is listen! If a donor says

"I wish I could do more."

Now, you can start a conversation with: ***"I understand. Some people who say that have named our nonprofit in their will or other plans."***

If they say, *"That's not for me,"* move on. But they might say, *"I never considered that"* or *"I hate to admit I don't have a will,"* in either case, respond with, *"may I send you more information about charitable estate planning?"*

You may even hear, *"I've already done that."* No matter what, if a person shows interest, make sure to follow up appropriately!

Bottom Line

You don't need to be an expert. Our donors want to help – it's simply a matter of sharing information about alternative charitable giving opportunities. Your point person is knowledgeable about charitable planned gifts and is happy to talk with donors, their attorneys and other advisors about ways they can make a difference.

Important Information: (nonprofit name) Tax ID: xx-xxxxx

For information on stock transfers, bequest language, IRA rollover gifts, Charitable Trusts, Donor Advised Funds, gifts of property or any other planned gifts, please contact: