



Rachel
MUIR

**YOUR FUNDRAISING GOLD MINE:
LEGACY GIFTS**

April 18 2024 | TEFN



Rachel Muir, CFRE

- Founder: Girlstart
- Featured on: Oprah,
- CNN, the Today Show
- AFP Outstanding Fundraiser of the Year
- What Rachel does: custom training, board retreats, online classes
- Weaknesses: chips, queso

 @rachelmuir

www.rachelmuir.com



Let's learn more about you...





...you've personally invited board members
to name your org in their will(s)

...you have named a charity in your will

Raise your hand if...you have a will

Types of Planned Gifts

68%  **Bequests**

30%  **Insurance Policy**

19%  **Retirement Plan**

19%  **Charitable Trust**

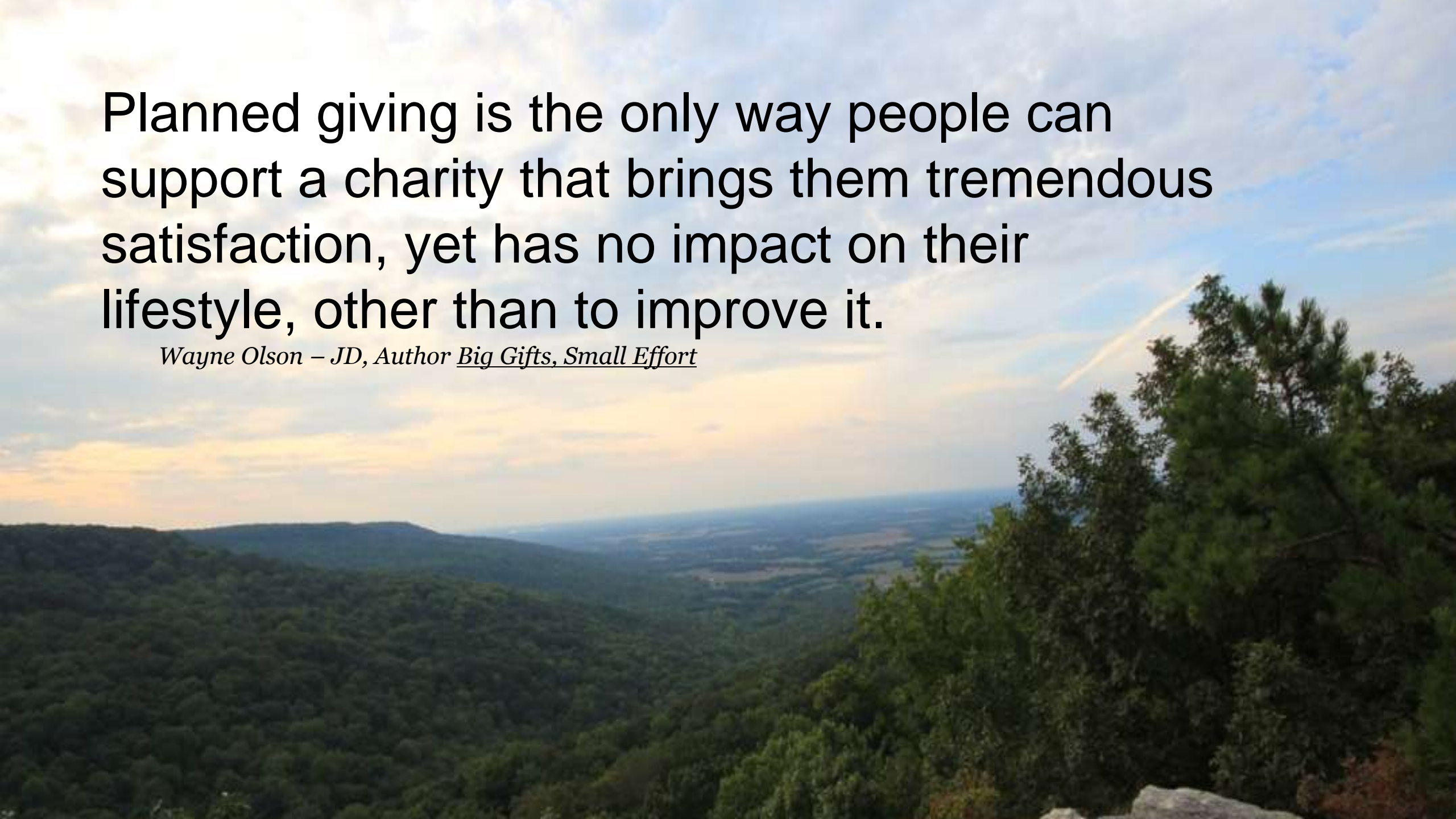
Most common
planned gift
amount is

**\$100,000 –
\$249,999**



Planned giving is the only way people can support a charity that brings them tremendous satisfaction, yet has no impact on their lifestyle, other than to improve it.

Wayne Olson – JD, Author Big Gifts, Small Effort



Why do people do it?

Why People Make Planned Gifts

- 1 Leave a legacy
- 2 Save on taxes
- 3 Make an impact on the world
- 4 Help Social Good Organizations





Consult with family, friends tax advisors first

Will make several planned gifts in lifetime

Giving won't sacrifice their comfort level

If children, taking care of them is #1

Characteristics of planned gift donors



You don't need to
be an expert to
promote legacy
giving.

Setting expectations: Results

With good marketing roughly 2.5% of your donors will add a gift to you in their wills.

If you have 6,000 active donors that's 150 bequests.

Source: Agents of Good

Most common planned gift amount is

**\$100,000 –
\$249,999**



Source: Blackbaud

**Objection 1:
We won't see this money for decades.
We need it now.**





“

Most realized bequests are added
within 5 years of death.”

Russell James, J.D., Ph.D, CFP,
Texas Tech University

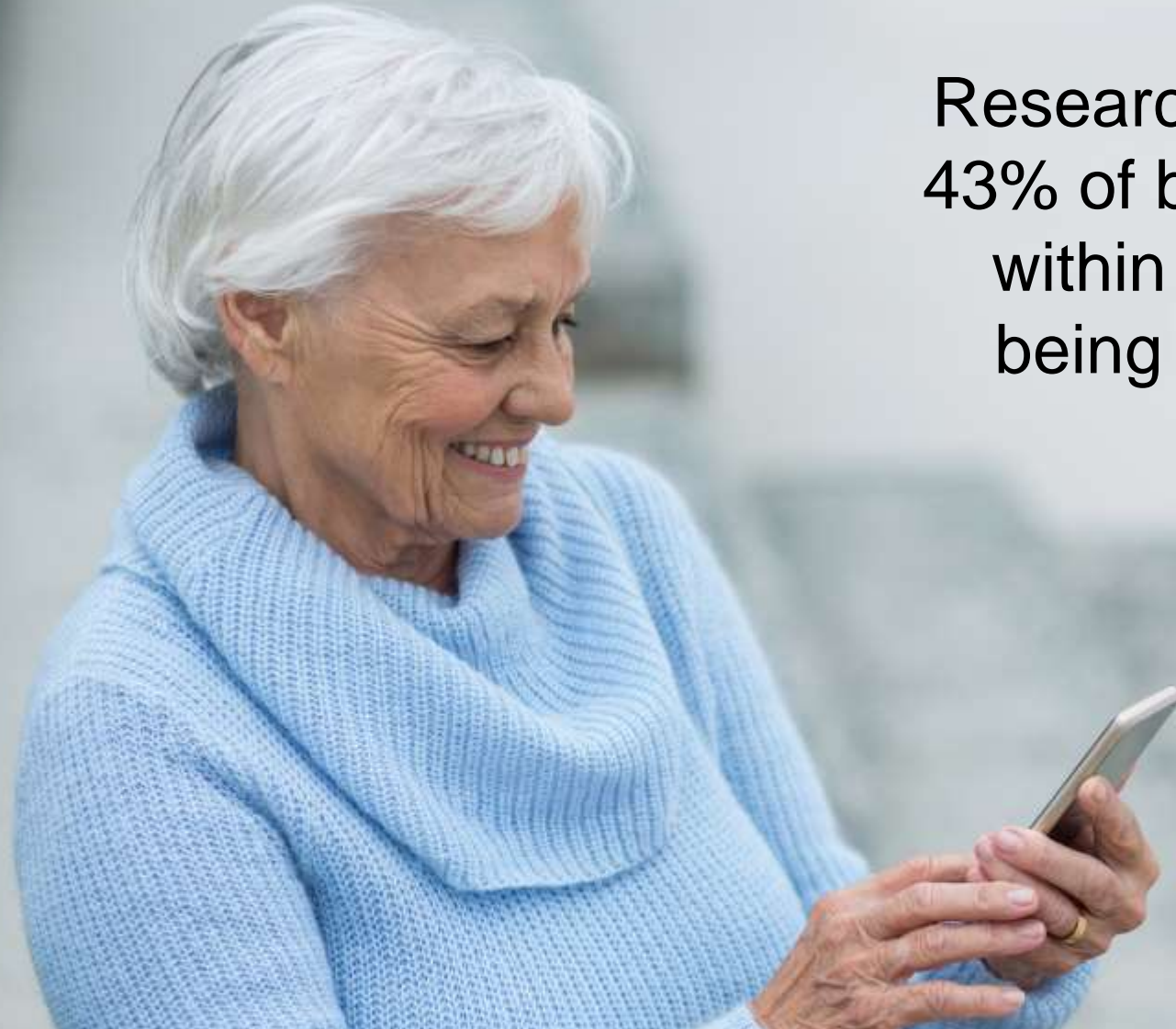


[Facebook.com/RachelMuirFundraising](https://www.facebook.com/RachelMuirFundraising)

Setting expectations: Time frame

Research in the UK found that 43% of bequests were realized within 1 to 4 years of a will being written or amended.

Source: Tom Ahern and Mark Phillips





Age 65 Birthdays

1995: 2,800 a day

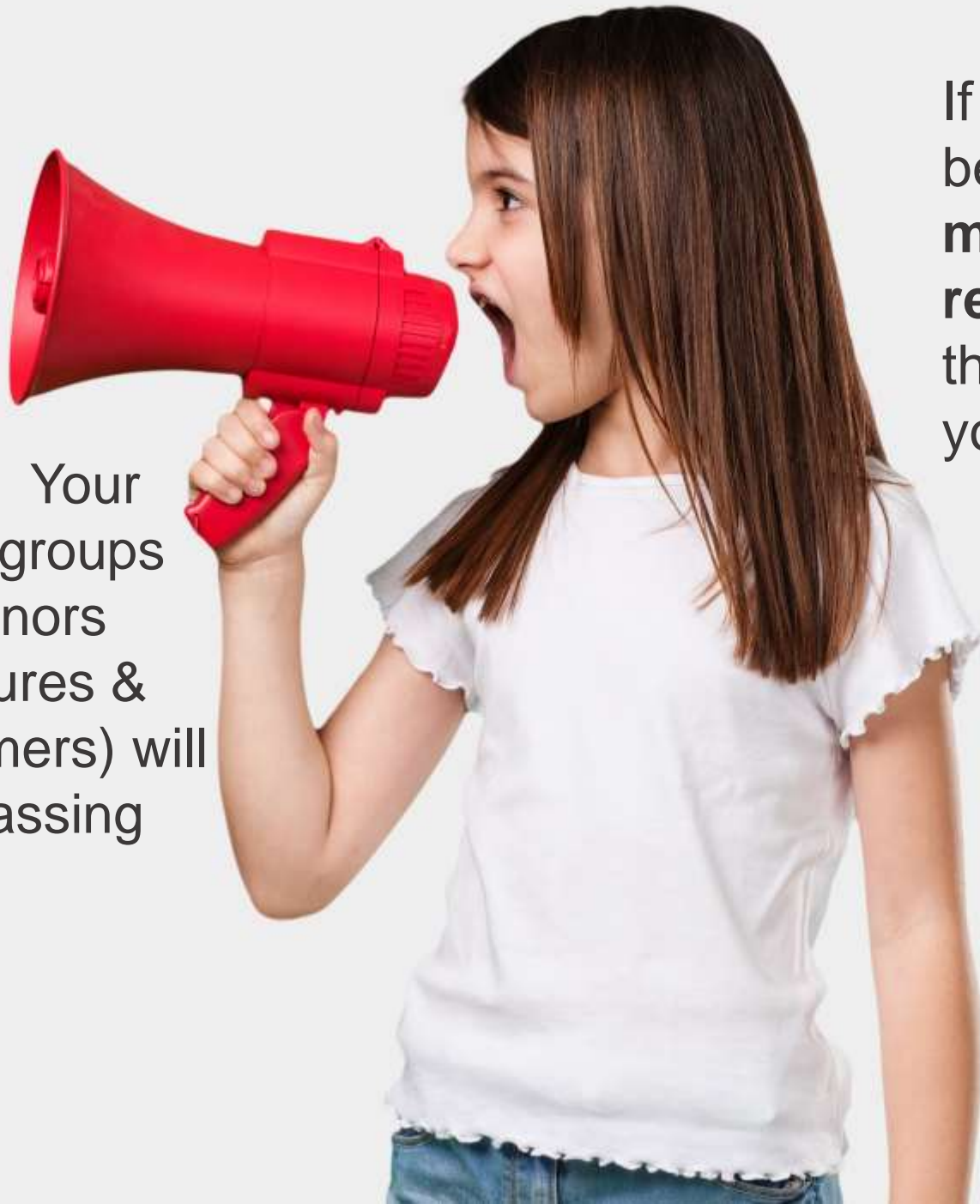
2019: 10,000 a day

Gift Planning does 2 things:

- ✓ Lower taxes
- ✓ Trade a gift for income
(income back to donor or a
tax-free inheritance to children)



Fact: Your best groups of donors (Matures & Boomers) will be passing on.



If you don't secure bequests, you'll have a **massive decrease in revenue**, because they're the backbone of your annual program!

If you aren't asking them now know that **OTHER CHARITIES ARE**

“

Dead people give away more money than
all US corporations combined.”

Andy Robinson, How to Raise \$500 to
\$5,000 from Almost Anyone



Common Legacy Objection #2

I don't want to
think about
dying right now



Response:

I'm here to talk about life.

“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.”



A University Award Changed Her Life. Now She's Paying It Forward

Source: Lynne Boardman, David Kravinchuk and WillPower.ca

Common Legacy Objection #3

“My kids will hate me”

or

“I have a family to take care of”





**How a Donation in Your Will Can Benefit You
AND Your Family**

Response:

- “They will be so proud!”
- “Of course, we all want to take care of our families first.”



**Writing Your Will May Be the Kindest Thing
You Do for Your Loved Ones**

Are you one of the 49% of Canadians that don't have a Will? Or maybe you do have a Will but there have been changes...

Common Legacy Objection #4

It sounds
complicated



Solution: Share testimonials of how EASY it was

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.”

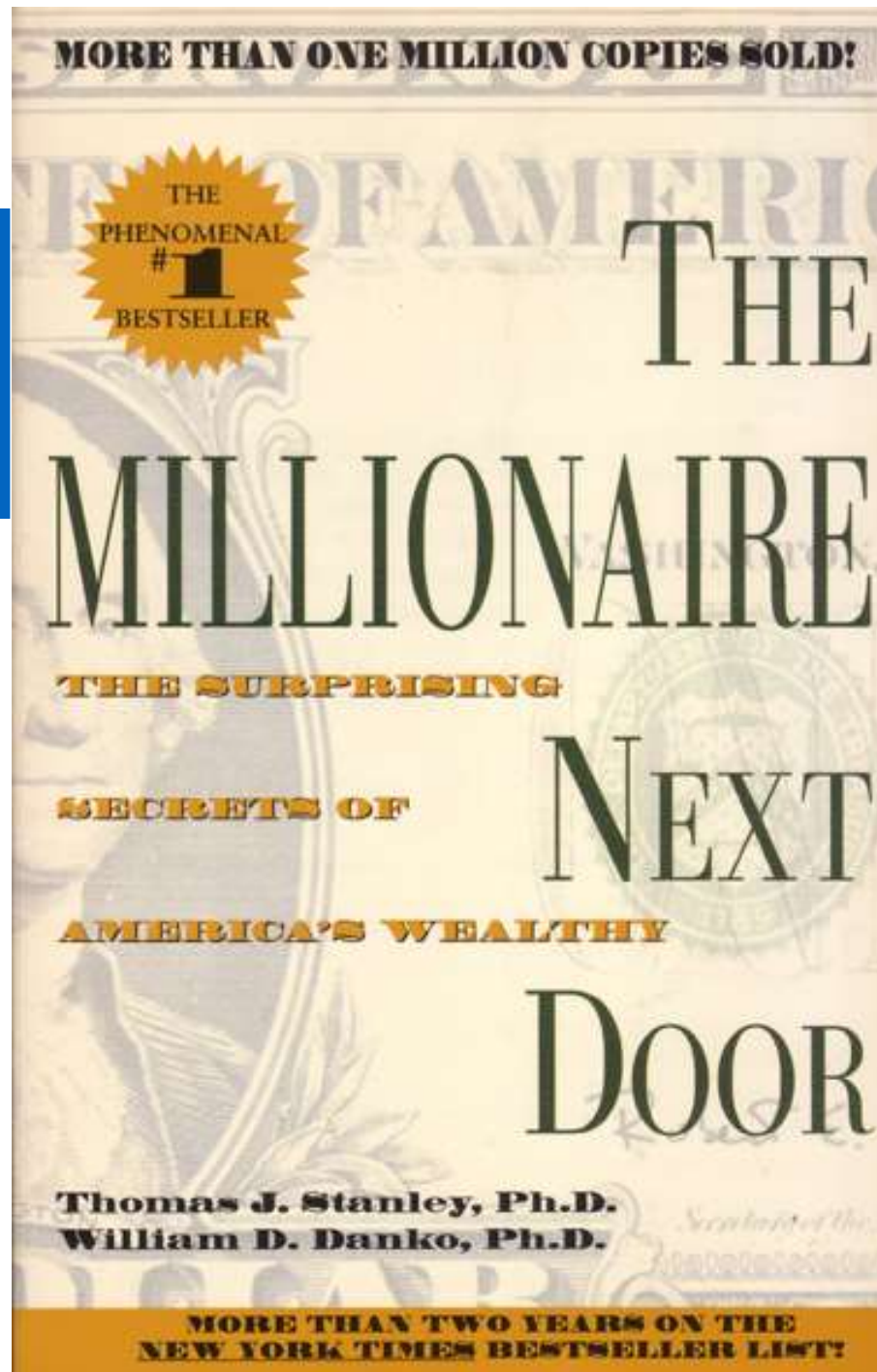
-Joanna

Share testimonials of how EASY it was

Once we decided to leave a bequest in our will for Rouge Valley, making the arrangements was pretty straightforward. We simply spoke to our lawyer about it when we updated our will, so it didn't take any extra time or money.

So when I recently attended a seminar about wills and learned how easy it is to leave a bequest to a charity without depriving my family, I decided I would remember Red Cross in this special way.

What does a
bequest donor
look like?



90/10

Source: Iceberg Philanthropy



Conventional wisdom: Loyal Annual Fund donor



Source: Cool data blog

Is planned giving right for me?

- ✓ We have a gift acceptance policy
- ✓ We have individual donors
- ✓ We are willing to market, accept and steward planned gifts



QUIZ TIME

www.leagueofextraordinaryfundraisers.com/login

What do they all have in common?



90% of planned gifts are...



Charitable gift annuities

Charitable remainder trusts

Bequests

Life insurance

Retirement plans

The average age of
a person writing
their will for the 1st
time is...



65

60

52

44

40


The average age
when a donor
makes their 1st
planned gift is...

44

52

60



A man and a woman are sitting in a bed, smiling and petting a brown and white dog. The man is shirtless and has a beard. The woman is wearing a white tank top and a grey cat-ear headband. They are covered with a white blanket featuring a green and red floral pattern. The bed has a dark green metal headboard. On the wall above the headboard is a colorful, patterned artwork. The background is a plain white wall.

What percent of
American households
are childless?

60

57

45

40

38



Launch a program in 2 steps

Want training from Rachel? Check out -> leagueofextraordinaryfundraisers.com

Step 1: Adopt a Gift Acceptance Policy

1) Gifts Generally Accepted Without Review—

- a) *Cash*. Cash gifts are acceptable in any form, including by check, money order, credit card, or on-line. Credit card donations must currently be made on-line.
- b) *Marketable Securities*. Marketable securities may be transferred electronically to an account maintained at one or more brokerage firms or delivered physically with the transferor's endorsement or signed stock power (with appropriate signature guarantees) attached. All marketable securities will be sold promptly upon receipt unless otherwise directed by xxx's Board of Directors. In some cases marketable securities may be restricted, for example, by applicable securities laws or the terms of the proposed gift; in such instances the decision whether to accept the restricted securities shall be made by xxx's Board of Directors.
- c) *Bequests and Beneficiary Designations under Revocable Trusts, Life Insurance Policies, Commercial Annuities and Retirement Plans*. Donors are encouraged to make bequests to xxx under their wills, and to name xxx as the beneficiary under trusts, life insurance policies, commercial annuities and retirement plans.
- d) *Charitable Remainder Trusts*. xxx will accept designation as a remainder beneficiary of charitable remainder trusts.
- e) *Charitable Lead Trusts*. xxx will accept designation as an income beneficiary of charitable lead trusts.

Step 1: Adopt a Gift Acceptance Policy

- 2) **Gifts Accepted Subject to Prior Review**—Certain forms of gifts or donated properties may be subject to review prior to acceptance. Examples of gifts subject to prior review include, but are not limited to:
- a) *Tangible Personal Property.* The Board shall review and determine whether to accept any gifts of tangible personal property with a Fair Market Value greater than \$5,000 in light of the following considerations: does the property further the organization's mission? Is the property marketable? Are there any unacceptable restrictions imposed on the property? Are there any carrying costs for the property for which the organization may be responsible? Is the title/provenance of the property clear?
 - b) *Life Insurance.* xxx will accept gifts of life insurance where xxx is named as both beneficiary and irrevocable owner of the insurance policy. The donor must agree to pay, before due, any future premium payments owing on the policy.
 - c) *Real Estate.* All gifts of real estate are subject to review by xxx's Board of Directors. Prior to acceptance of any gift of real estate, xxx shall require a survey and an initial environmental review by a qualified environmental firm at the donor's expense, unless the Board votes to specifically waive this requirement. In the event that the initial review reveals a potential problem, the organization may retain a qualified environmental firm to conduct an environmental audit. Criteria for acceptance of gifts of real estate include: Is the property suitable for the organization's purposes? Is the property suitable for the organization's purposes? Is the property suitable for the organization's purposes?

Step 2: Market it using donor stories

Did you know you can use a variety of assets to make a gift to our organization?

We accept all type of gifts, such as bequests, stock, gift annuities, life insurance and more.

Let me tell you about Yasmin, one of our volunteers, who was able to make a HUGE impact by giving part of her gift now, and the rest later on...



“

Making people aware that you value legacy gifts is the first step to getting them.

Claire Axelrad, www.clarification.com



Facebook.com/RachelMuirFundraising



Step 3: Market on website, newsletter etc

Step 2: Invite donors w/3+ gifts to give

Step 1: Invite your board

Ask your board at next board meeting

Do you have an estate plan? _____ Yes _____ No

Have you named a charity(ies) in it? _____ Yes _____ No

Do you have our org in your will? _____ Yes _____ No

If no, would you consider it? _____ Yes _____ No

Name (optional) _____

Still on the fence?



Once they make a legacy gift their giving spikes 77% and sustains up to 8 years later



Source: Russell James, J.D., Ph.D, CFP, Texas Tech University



Fundraising Campaigns that
Hit the Jackpot

At Blackbaud, driving social impact isn't a side project. It's our business. [Learn more](#) **blackbaud**

SOFII exists because of partnerships with organisations like [Blackbaud](#).

Find out how you could [become a SOFII business partner](#).

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Ideas, information, initiatives to help you change the world

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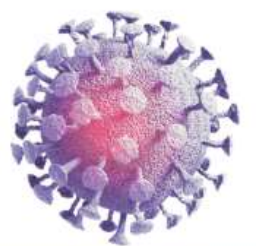
[History & evolution](#) [Inspiration & effectiveness](#) [Tools & techniques](#) [CDE: the donor experience project](#) [WoW!](#)

[Donate to SOFII](#)

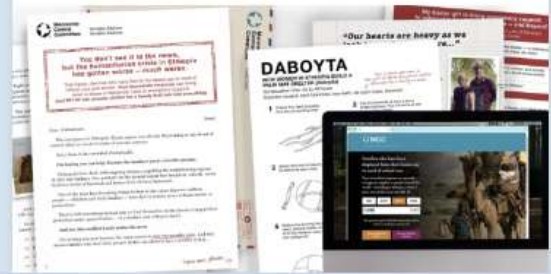
CRISIS FUNDRAISING

Everything you need to fundraise effectively - now

Fundraising in a time of crisis: SOFII's guide to navigating tough times



Menonite Central Committee Canada: Tigray, Ethiopia crisis appeal



Don't be tone deaf on Ukraine



THE SOFII ONE HUNDRED

[Find out more here](#)



TRENDING NOW

What's hot on SOFII and in fundraising?



Book of Life Legacy Program



Name
one
thing we
dislike
thinking
about



This program turns regular legacy giving on its head by celebrating a life well lived instead of a life that has ended.

Sofii.org Jewish Foundation of Manitoba

Learn more at: bookoflife.jewishfoundation.org

BookofLife.JewishFoundation.org



— THE ENDOWMENT —
BOOK OF LIFE

Welcome to the Endowment Book of Life (EBOL).

The EBOL program allows participants to leave both a financial legacy and a historical legacy to our community.

To find out more information about getting your story into the Book of Life, contact the JFM at 204.477.7520 or toll-free from the US/Canada at 1.855.284.1918. You can also visit our office on the 4th floor of the Asper Jewish Community Campus.

SELECT A LETTER TO DISPLAY SURNAME LIST:

A	B	C	D	E
F	G	H	I	J
K	L	M	N	O
P	Q	R	S	T
U	V	W	X	Y
		Z		

TO BECOME A SIGNER OR FOR MORE INFORMATION ABOUT THE PROGRAM PRESS HERE



JEWISH FOUNDATION
OF MANITOBA



In exchange for a pledged gift in their will, donors are invited to write the story of their life. If wanted, charity helps with interviews & edits. Book gets published, annual event is help to sign their books and celebrate their lives.

Learn more at: bookoflife.jewishfoundation.org

ENID (GOLDSTINE) MARANTZ



Enid Marantz adds her story to the Endowment Book of Life



THE ENDOWMENT
BOOK OF LIFE

MY STORY...

Enid Marantz is clearly very proud of the fact that her family has deep roots in the Winnipeg Jewish community and that it has contributed significantly to the community's history and development.

Enid's paternal grandfather, Max Goldstine, was a Hudson's Bay factor at Fort Qu'Appelle during the Riel Rebellion. He moved to Winnipeg in 1880, married Jennie Cohn from Lexington, Kentucky and in 1883 established a clothing and general merchandise business, The Manitoba Clothing Company, at 550 Main Street.

Enid's maternal grandfather, Rueben Robinson, was the son of Rabbi Nathan Robinson, who had settled in New York. Rueben and his wife Bessie Sugarman, who was born in Alexandria, New York, arrived in Winnipeg in 1903. They had been living in Wabigoon, Ontario where Rueben was involved in the fur trade, but they found life there too difficult.

In Winnipeg Rueben continued in the fur business, establishing R.S. Robinson & Sons, later to become S.I. Robinson. His community activities included laying the cornerstone for the Talmud Torah in 1912, founding a Reform synagogue that eventually merged with Shaarey Zedek, and establishing the city's first Jewish orphanage, the Esther Robinson Home, named for his mother.

Rueben and Bessie had ten children, among them Enid's mother Fanny. Fanny was talented in art and music, attended the Havergal School for Girls and was registered to study art and music in Heidelberg when the First World War broke out.

Enid's father Irvine was born in Winnipeg. He left school after grade eight to work in the family business. He was a kind, gentle and generous man who enjoyed the loyalty of life-long customers. He served as a Mason with the Jewish Lodge and was involved with the Shaarey Zedek Synagogue. Fanny and Irvine were very assimilated. They socialized exclusively with other Jews, raised Enid and her brother Allan on Canora Street in the Wolseley area and attended all the cultural events that the community offered.

Enid was raised in a very proper Victorian manner and often accompanied her mother to arts and musical events. In addition Enid was an avid equestrian. She attended Sunday school at the Shaarey Zedek Synagogue, elementary school at Laura Secord, and high school at Gordon Bell, and then continued her studies at the University of Manitoba. There she joined a Jewish sorority and graduated in 1946 with the



JEWISH FOUNDATION
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TO BECOME A SIGNER OR FOR MORE
INFORMATION ABOUT THE PROGRAM
PRESS HERE

Thank You To all of this year's signers for participating in

EBOL WEEK

2021

Starting Monday, October 25, and for the entire week following, we dedicated all of our communication channels to these six amazing people. The Foundation's social media, directed email and print advertising encouraged all to visit our website and discover these inspirational life stories. Each day of the week, one story could be found on page B3 of the Winnipeg Free Press, topping off the experience and bringing our signers' stories to our entire Manitoba community.

Year after year, the importance of the commitment these individuals have made remains the same. Endowment Book of Life Signers will leave both a financial and historical legacy to our community. Their commitment is a gift to our children, grandchildren, and all of our families' future generations.

Below you will find a short excerpt from each signer's story.

We encourage you to read them all, then visit bookoflife.jewishfoundation.org to read them all in their entirety!



SANDRA
CAPLAN

It is with mixed emotions that I write this story for the Endowment Book of Life. On June 2, 2017, my beloved husband, Barry Caplan, passed away after a very short battle with lung cancer. We were married for 58 wonderful years and always discussed all important matters together. Today, as I attempt to write this on my own, it is with a sense of loss and sadness, but also with a sense of joy that allows me to remember the great happiness in my life.

bookoflife.jewishfoundation.org
to read the whole story!



MIRIAM
KOHN

My parents were amazing, outgoing, incredibly hardworking people. They both came to Canada from Europe, met and married in Winnipeg and created a life of opportunity for my brothers and me. I chose to be part of the Book of Life to tell their story, especially how their influence shaped my life, my family and my community.

My father, Samuel Michael Kohn, was born in Russia. In 1912, when he was two years old...

bookoflife.jewishfoundation.org
to read the whole story!



152

Bequests

+74

New signers 2017-2019

+3,454,812

Legacy income

Learn more at: bookoflife.jewishfoundation.org

Planned giving postcards



Planned Giving Postcards



*The good news is we have enough money
to build our new building.*

The bad news is it's still in your pockets.

Want help? LeagueofExtraordinaryFundraisers.com

**Epic
Fundraising
Examples**



April

**How to Find
New Donors**



May

**Makeover My
Board**



June

A woman with long brown hair and glasses, wearing a bright green short-sleeved top and a gold necklace with a circular pendant, is sitting on a brown leather couch. She is looking slightly to her right with a pleasant expression. In front of her is a black laptop. To her left is a colorful pillow with yellow, orange, and red sections. To her right is a white pillow with the text "GOOD VIBES" in bold black letters. The background wall has a light-colored, textured pattern. A white speech bubble with a black outline is positioned above her head, containing the text "THANK YOU!".

THANK YOU!

rachel@rachelmuir.com

Slides-> rachelmuir.com/handouts