

Having the Talk & Making the Ask

Day of Learning
March 29, 2022

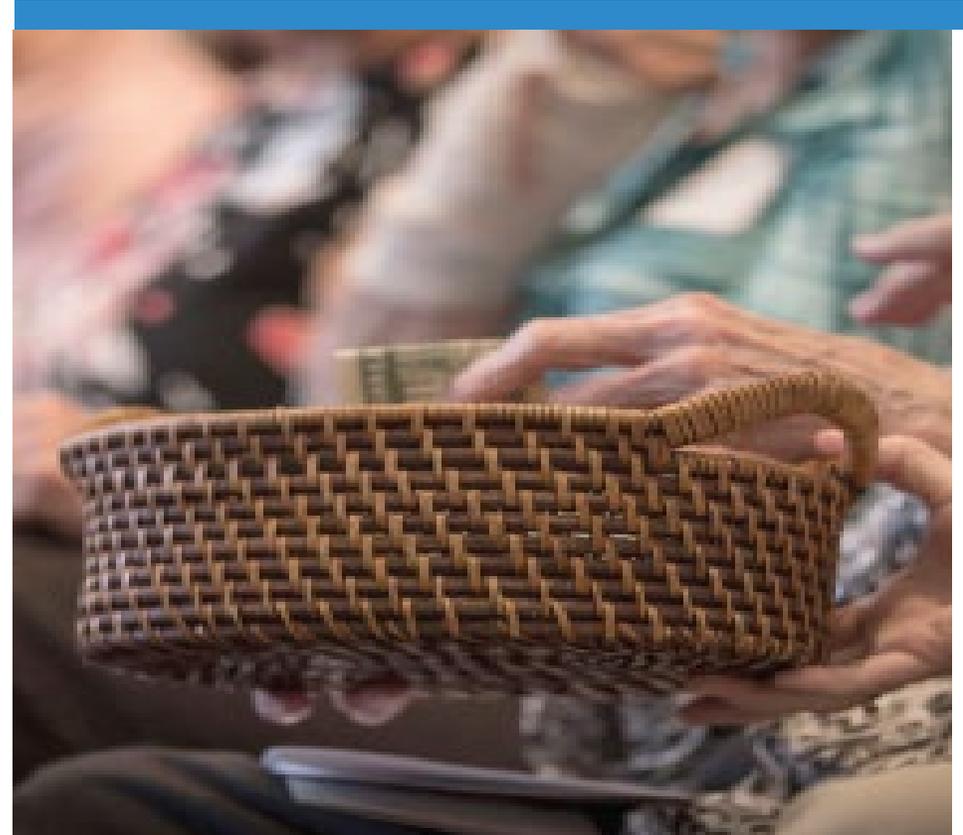
Introductions

- Olanda Carr, Jr.
Senior Ministry Relations Officer (East Region)
Presbyterian Foundation

- Rev. Dr. Brandi Casto-Waters
Senior Pastor
Reid Memorial Presbyterian Church

Removing the Sting

- Legacy giving is *not* about death
- There is never ONE “right time”



CAST THE VISION FOR THE FUTURE

People give for many reasons – find ways to tie those different motivations to your church's mission in the future. Possible motivations:

- *helping those who have less*
- *leaving a personal legacy*
- *making a better future*
- *supporting their church family*

SHARE HOPE AND JOY FROM SCRIPTURE

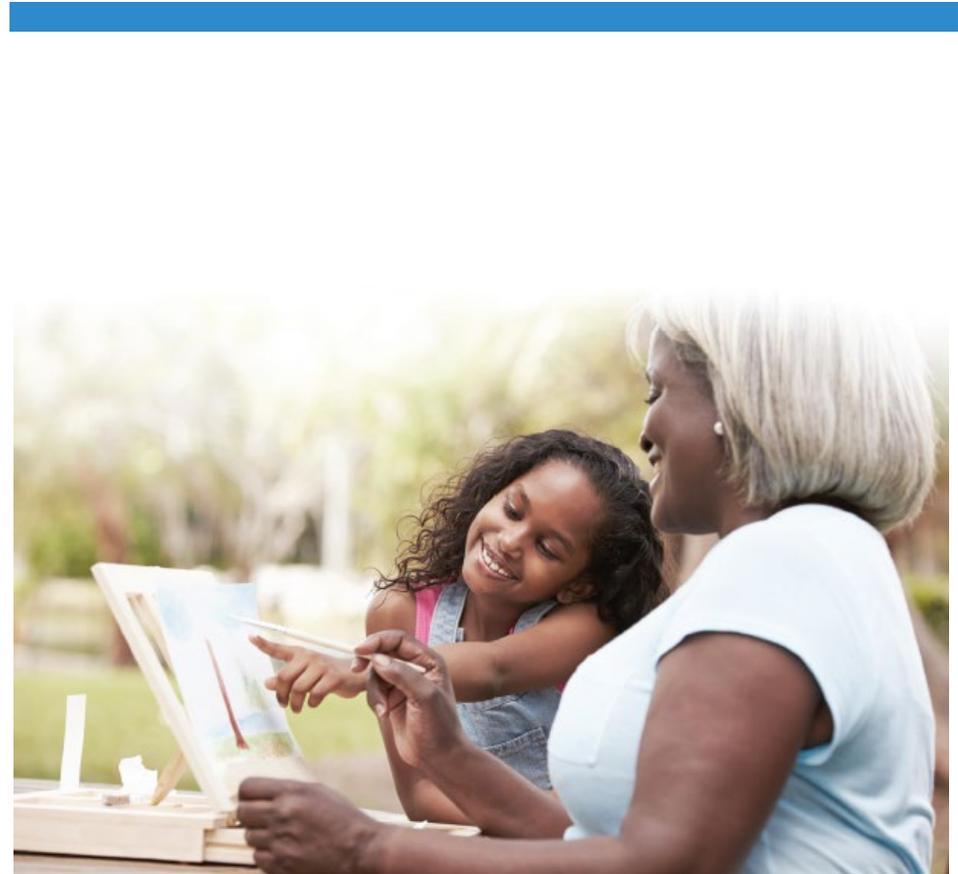
Many Biblical passages underscore the joys of giving, our call to take care of God's earth and people, and the promises of life to come ...

- *Choose one or two passages that truly speak to you and your congregation.*
- *Let the Holy Spirit work through those passages and you to help people see the importance and power their gifts could have on ministries closest to their hearts.*

TELL STORIES

People want to know that their donations will have an impact.

- *Tell the stories behind the bequests that are making a difference to your church today.*
- *Let other givers share their stories about why they are choosing to bless the church with a legacy gift.*



SHARE THESE STORIES IN DIFFERENT WAYS

- **Written** – in newsletters, bulletins, emails, donor letters, etc.
- **Testimonial** – let people share their story during a sermon, minute for mission, workshop, or class. Also, put together short videos that can be shared on your website, online video channel and in emails. No need for high production levels – video captures from a smart phone work just fine!

ASSURE THEM THEY DON'T HAVE TO BE RICH

Many people assume that they need to be wealthy to make a bequest or legacy gift.

- *Let people know they can give smaller amounts that will be invested so they'll grow over the years to come and that it doesn't cost them anything now.*
- *Be sure they know they can give from other assets such as retirement accounts, life insurance, and real estate.*



ASK

- The primary reason people don't make bequests is that no one has ever asked them or let them know you need their help.
- When faithful givers are asked to make a bequest, most are quite likely to say yes.
- Keep the request simple

SAY THANK YOU

Thank donors and prospective donors often.

- Follow-up on any contact you have, and thank them for their time, interest, input, etc.
- If they decide to make a gift, write a personal note thanking them for that decision, and reinforce the vision they are supporting.
- Ask donors if they wish to be publicly acknowledged, either through your recognition program, or by a notice in the bulletin or newsletter.



Let's Have A Conversation



Q & A

Sharing of Experiences

Comments