

Legacy Circle

Here are a few ways you can use your Legacy Circle - or whatever you call your recognition program for planned gift commitments – to encourage planned gifts.

1. Announce new members: Consider this announcement for new Legacy Circle members in your newsletter:

We are pleased to enroll
John Smith
in the (organization's name) Legacy Circle
*The Legacy Circle honors those who
have included (organizations' name) in their estate plan.*

2. Invite donors who have contributed repeatedly to your organization at whatever level to become members of the Legacy Circle:

Dear

I hope you will consider joining our Legacy Circle.

The Legacy Circle honors those who have included the organization in their estate plan. I, like most of our Legacy Circle members, did so through a simple bequest in my will. (I enclose basic bequest language for your and your attorney's review.) Some Legacy Circle members use other methods:

* Including (organization's name) in their retirement plan

* Including (organization's name) as a beneficiary of their life insurance policy. (Call your agent for a beneficiary designation form and add our organization as a beneficiary.)

* Using a charitable remainder trust or similar vehicle that gives them certain immediate tax and income benefits.

If you have any questions regarding these methods, do not hesitate to call (contact person and phone number). Whatever method you use to include the organization in your estate plan, you will qualify for membership in the Legacy Circle simply by notifying us that your gift is completed. The method you use or amount set aside is of interest to us, but we

consider both private information that you need not share with us. It is enough for us simply to know that you have gone to the trouble of remembering our work in your estate plan.

Thank you for your loyal support.

Sincerely,

Chair, Planned Giving Committee

3. Provide donors with a Legacy Circle enrollment form. Always give them the option of anonymity:

Dear (Contact Person)

I have remembered (name of organization) as a beneficiary of:

- a bequest in my will or trust
- a life insurance policy
- an IRA or bank account
- a charitable remainder trusts
- other method _____

Please check one:

- You may publish my name.
- I wish my gift to be anonymous.

Please print:

Name _____
Address _____
City _____ State _____ Zip _____
Phone _____

I would like my name (our names) to appear as follows

Comments (optional):

Signature _____

Please return to: (Your organization's contact person and address)

4. Write articles on Legacy Circle members. Here's how:

1. Quickly assure the donor that you are writing a first draft which they will have time to review, correct, and comment on before the final draft is submitted for publication. That puts your subject at ease.
2. If they say they are not personally interested in publicity and are reticent about being interviewed, tell them you understand that, but that nothing encourages planned gifts to the organization more effectively than hearing from someone who has made one.
3. Tell them that the article will have to be concise enough to fit limited space, but detailed enough to tell the story.

After those introductory comments, begin the formal interview. Here are some typical questions:

1. Let's start with the nature of your gift. Was it a simple bequest, an insurance designation, an IRA designation, a charitable trust?
2. When did you make your planned gift commitment and what was the occasion? *Often people tell you that they were revising their estate plan because of some event in their lives – the death of a spouse, travel plans, the sale of a home and so on. Details like that add interest.*
3. Why did you choose to include the organization in your estate plan? *This allows them to talk about what the organization has meant to them, again adding details that may resonate with other potential planned givers.*
4. Is this a general gift, or do you want it to support a specific purpose?
5. What do you tell our donors to encourage them to make a gift like yours?

As they respond to these broad questions, look for telling details that can give the story character. I usually conduct interviews by phone and type the donor's quotes into my computer as he or she speaks. You may find it easier to work face-to-face.

I don't try to get everything word-for-word because my job is to make the article as concise and readable as I can. I do try, however, to have the donor's voice, not mine, dominate. If donors say something in an interesting way, I often to ask them to repeat it again so I can get it word-for-word.

Don't forget to ask them to send you a picture or, if you have the budget, arrange for one to be taken.

Here are two examples of planned giving stories I have done for clients that have received good response from readers.

Pierce Bequest Inspired By Boy's Passion for Life

Col. Jim Pierce, (retired, U.S. Army) lost Elizabeth Anne, his wife of 37 years, to emphysema in 1998.

Devastated by her death, he began volunteering that same year at the North Central Regional Office of CCI, near Delaware, Ohio, which his late wife supported.

There Pierce met Capernicus "Caper" Brown, who arrived with six other children seeking canine companions. Brown, then 18, had survived third degree burns over 98 percent of his body in a 1990 fire, losing parts of both arms and both legs to amputation.

Maneuvering his electric wheel chair with the aid of prosthetics, the boy was fiercely determined to have a full future. "I want to be successful in my life," Caper told the Central Illinois *Journal Star*. "I don't want to be in a nursing home. I don't want to be on welfare," he said.

Pierce looked at the boy and thought, "I want to die, and he wants to live." It didn't compute.

Pierce was drawn to Canine Companions by Elizabeth. He retired from the Army in 1974 and began a career as a corporate executive. His wife opened a pet shop. He took on the washing-up chores at the shop to help her after his day at the office. They moved to Indianapolis in 1976 where Elizabeth bred and raised cocker spaniels. She had the top cocker spaniel in the country for about five years. He continued his post-military executive career, working as director of research at Switcher Engineering and later started a labor law consulting firm.

More as a dutiful widower's ritual to honor his wife's memory than anything else, he began washing dogs at the North Central office. But he found that service to others helped him deal with his grief, and meeting children like Caper put his own loss in perspective.

Pierce, who in the past had thought his late wife's support of CCI alarmingly generous, plunked down \$10,000 to sponsor Caper's dog, Jaycee, a golden retriever.

"I guess I was a typical male chauvinist." Pierce said with a deep chuckle. "Elizabeth was devoted to CCI and a great financial supporter. I just went along for the ride."

That has changed now.

He has since sponsored two more canine companions. About six months ago, he did a living trust which sets aside \$100,000 in his estate for CCI. The charitable bequest will help reduce estate tax and continue his support for CCI in his wife's honor.

Of his sponsorship of Caper's canine companion, he says simply, "The boy did more for me than I did for him."

(CCI is honored to enroll James Pierce as a member of its Heritage Society, which honors those who have put the organization in their estate plans. To join the Heritage Society, call Robert Henning at 707-577-1789).

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Gibbons Fund Rooted In School's Early History

The Charlotte McFarland Gibbons Scholarship Fund, founded by Jack Gibbons (SI '37) at St. Ignatius College Preparatory in 1994 in honor of his mother, traces its roots to late nineteenth century San Francisco.

Charlotte McFarland was orphaned in infancy in the 1880s and placed with an aunt who was staunchly anti-clerical and opposed to the formal education of girls. Raised on her aunt's small San Francisco farm in the Castro district at the west end of Market Street, she took covert reading lessons at nearby St. Ignatius College as a young girl. "She had to hide her books from her aunt," Mr. Gibbons said.

Her instructor at the college, which was established in 1855 on Market Street where the Emporium now stands, was its founder, Father Anthony Maraschi, SJ.

The Italian-born priest spent 43 years of his ministry in San Francisco where he developed a reputation for helping the poor, mortifying the flesh ("She said he used to sleep on a bed of nails," Mr. Gibbons reported), and advising the city's business community.

Charlotte Gibbons' hard-won love of reading was life-long, and perhaps seasoned by Father Maraschi's eye for a good deal. (His earlier real estate purchases allowed him to build the first St. Ignatius and quickly extinguish its debt.) Before her eyesight began to fail in old age, Mrs. Gibbons' favorite readings were The Wall Street Journal and the daily racing form.

In her nineties, she followed the Byzantine entanglements of the Watergate hearings, connecting the cast of characters by relationship lines she marked on butcher paper rolled out on her living room floor in front of the television. Mr. Gibbons said she was the only person he knew who fully understood what was going on as the hearings unfolded.

As well as honoring Mr. Gibbons' mother, the Gibbons' Fund expresses Jack's own appreciation for his SI education.

He remembers the SI curriculum as a grueling four years of history, math, civics, Latin, ancient Greek, and other languages, all punctuated by tough blue book exams.

"Everything we did during our waking hours as students seemed to be centered on the school," he said. "Everyone was pushed to participate. You had to memorize five lines of classical Latin every night. That seemed to sharpen your memory to the point you could look at about anything and have instant recall. I can still conjugate a verb or decline a noun. After SI, college was a piece of cake."

Mr. Gibbons is a WWII veteran, retired deputy director and chief accountant with the California Public Utilities Commission, and current consultant to the utilities industry. He established the Fund to help financially pressed students.

(For information on establishing scholarship funds at SI or on SI's Heritage Society, call Director of Development Steve Lovette at 415-731-7500, ex. 214.)