

Phone call script for planned giving calls

Hello, (name of prospect). My name is _____. I'm a volunteer with _____ . Is this a convenient time for you to talk for a few minutes?

Have you heard of the legacy circle? (Give time for a response. Remember, the more you draw out the person you've called, the more effective the conversation is likely to be.)

I'm hoping you will consider attending the next legacy circle recognition party. It's part of our efforts to encourage our supporters to consider including the organization in their estate plans. For example, I and (name of spouse) put a bequest to the in our living trust (or describe method you used.)

This has nothing to do with writing a check now. And the size of the bequest remains completely private. What we want to do is increase the membership of our Legacy Circle which honors those who have made an estate gift commitment. (Mention, if possible, the prospect's relationship to the organization.)

We want to make sure our organization will have the resources to (briefly describe the reason your organization needs and deserves planned gifts. If you are not clear on this point see *Your Case in Getting Started*). Could I put information on our Legacy Circle in the mail to you? Thank you.

We know including a good cause in an estate plan takes time and thought. We can send you sample bequest wording. We can give you information on making the organization a beneficiary of an insurance policy or retirement plan. We can provide information on charitable trusts or on wills or living trusts. What kind of information would be helpful to you?

(Note down any requests.)

Thank you very much for your time.

**Information form to be completed by volunteer
and given to staff for follow-up.**

Legacy Circle Lead

Caller _____

Person Called _____

Phone Number: _____

Date of Call _____

Response of Person Called:

O.K. to send information on Legacy Circle

Has already included the organization in estate plan

Asked for specific information on:

Writing a will or trust

Bequest wording

IRA designation

Charitable trust or gift annuity

Insurance designation

Other _____

Not interested in including the organization in estate plan

Comments: _____
