

## Two Presentations to Your Volunteer Groups

### Short presentation:

1. Start the presentation by asking a volunteer, preferably a member of the group, to describe why and how he or she made a planned gift commitment. The volunteer's personal witness adds a sense of reality to a presentation that might otherwise seem nonprofit wishful thinking.
2. Succinctly present your organization's case for planned giving. (If not much comes to mind see *Your Case* under *Getting Started*.)
3. Tell the story of someone who has made a planned gift commitment to your cause, distributing a one-page illustration showing the tax and income benefits, if any, of their gift.
4. Provide suggested wording on how to leave a bequest to your organization, with your name and phone number included for further information.
5. Enjoy the fruit punch and sandwiches and talk to the volunteers, not to staff or volunteers you already know.

### Long presentation:

1. Select a topic related to your organization's mission.
2. Discuss it with the head of the group you will be addressing to make sure it will be of interest to the audience. This can be a description of a new program, an update on issues your organization knows about in-depth, an overview of the organization's impact on the community, or even an estate planning issue, if the group is willing. (40 minutes)
3. In the last 5 to 10 minutes follow the steps #4, #5 and #6 outlined below.
4. Succinctly present your organization's case for planned giving. (If not much comes to mind see *Your Case* under *Getting Started*.)
5. Tell the story of someone who has made a planned gift commitment to your cause, distributing a one-page illustration showing the tax and income benefits, if any, of their gift. Provide suggested wording on how to leave a bequest to your organization, with your name and phone number included for further information.
6. Conclude the presentation by asking a volunteer, preferably a member of the group, to describe why and how he or she made a planned gift commitment. The volunteer's personal witness adds a sense of reality to a presentation that might otherwise seem nonprofit wishful thinking.