

Suggested Approach to Wills and Planned Giving Prospects.

Introduce Yourself

Tell them how long you have been a member and thank them for spending some time with you today.

Tell Them the Purpose of your Visit

“I (we) want to bring you up to date on what our church is doing to strengthen its long term mission funding.”

Listen to Your Prospect

Ask how long they have been a member and what the church means to them.

Use open ended questions to get the conversation rolling.

What initially attracted you to our church?

Why did you join?

How does this church compare to your former church?

What areas of mission are important to you?

How have you participated in the life of the church?

What has been your most memorable experience as a member?

How would you describe the church to a friend?

What are its distinctive characteristics?

Focusing on the Purpose of Your Visit

Having learned a little about your prospect, move the conversation to what others with similar commitments are doing for the church.

“I (we) would like to tell you a little about our church’s growing emphasis on long term mission funding.”

Some additional questions:

What do you think of when you hear about church endowments?

Has anyone spoken to you about our endowment program?

Have you ever considered a gift to the endowment?

Have you ever considered a bequest to the church?

Do you know about ways to make an endowment gift and perhaps receive more income than currently available in CD's, money market, and savings accounts?
Have you ever wanted the church to support a mission program that it could not afford?

Talk a little about the work of your church's endowment committee perhaps giving some examples of recent endowment gifts and how the donor(s) have designated their use. Explain that gifts can be made anonymously if the donor prefers.

Conclusion of Visit

Ask if the prospect would likely consider an endowment gift in the next six to 12 months.

Explain that individuals should consult their legal, tax, and financial advisors to make sure that the gift is consistent with the donor's estate plan. Make sure the prospect knows that the church does not give legal, tax, or financial advice.

Conclude your visit by thanking the prospect for giving you the opportunity to talk about the church's endowment. Leave behind an endowment brochure.

Tell the prospect that you will be following up within the next few weeks to answer any questions he or she may have.

Retain a record of your visit including your judgment of the donor's receptivity to an endowment gift.

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