



The Alaska Community
Foundation
**AFFILIATE
PROGRAM**





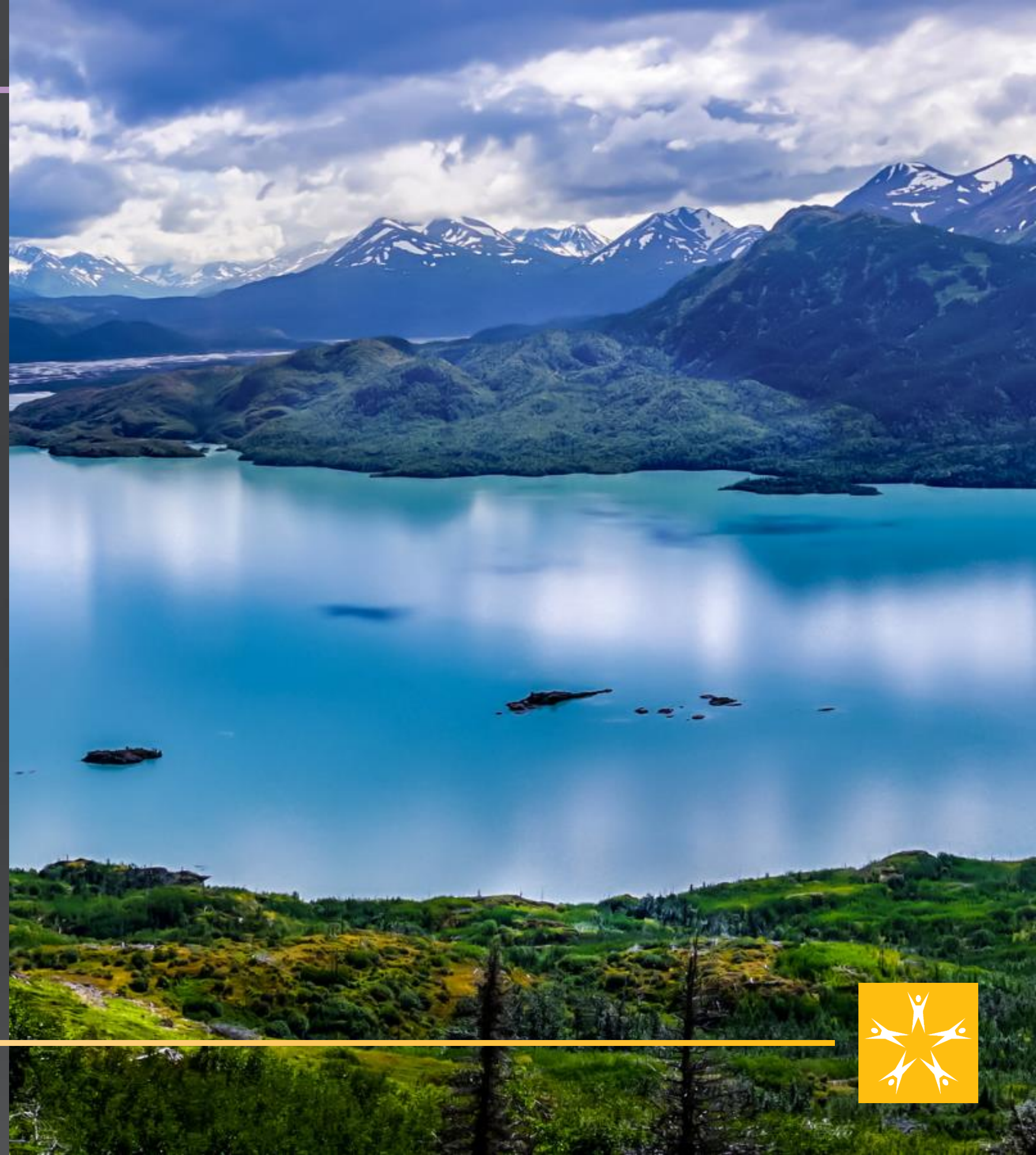
How to Talk about Legacy Giving

- Part I: Basics of Legacy Giving
- Part II: Benefits of Giving to Your Affiliate Community Foundation
- Part III: The Reasons People Give Legacy Gifts
- Part IV: Your role in Legacy Giving and How to Do It Well
- Part IV: Next Steps for your Affiliate Community Foundation



What is Legacy Giving

- Planned Giving
- Posthumous gift reflecting values of donor



Types of Legacy Gifts

- Bequests in Will or Estate Plan
- Beneficiary Designation of Retirement Account
- Split Interest Trusts



When and how do people leave a legacy gift?

- **First will**
Often at birth of first child
- **Revisions to wills/estate plans**
At time of life event
- **Average bequest to charity in US is \$35,000**



Two Foundations to Legacy Giving Success

Intentional Focus on
Legacy Giving

Advisory Board Members who are
Conversant in Legacy Giving



A Plan for Successful Legacy Giving at your Affiliate

- Set Goals
- Establish or Reinvigorate a Legacy Giving Committee
- Identify Audiences
- Donor Communications & Engagement Activities
- Monitor & Track Progress
- Legacy Donor Stewardship
- Action Steps & Timeline



The Alaska Community Foundation

Benefits of Community Foundations

Meet the local needs of the community now AND as they change into the future: Tangible examples are most persuasive

Local Commitment: An Advisory Board, made up of knowledgeable community leaders and volunteers like you, serve as the local experts and ambassadors

Immediate and Long-Term Impact: Community foundations are committed to the stewardship of assets ensuring that the charitable goals of the donors are met now and for generations to come

Privacy: Donor decides when or whether to be recognized for their gift or remain anonymous

Tax Advantages: Community foundations are public charities and donations qualify for the maximum available charitable deduction



Practice Talking about Benefits of your Affiliate Community Foundation

Why are you involved?

Why do you give?

One tangible example of impact.



Why Do Donors Leave a Legacy Gift?

- Passion for a Cause
- Legacy of Their Values
- Recognition in Perpetuity
- Tax Considerations



Legacy Donor Outlook #1

“I’m motivated to give to work that I feel is important and that I feel connected to.”



Legacy Donor Outlook #1

“I’m motivated to give to work that I feel is important and that I feel connected to.”

- Tell emotional stories that provide examples of the community needs your Affiliate meets.
- Talk about the good your Affiliate is doing and who you are helping.
- Provide tangible examples of causes you are supporting.



Legacy Donor Outlook #2

“I donate to organizations that I believe will achieve the impact I want to make”



Legacy Donor Outlook #2

**“I donate to organizations
that I believe will achieve
the impact I want to
make.”**

- Link what your Affiliate does to the values of the donor.
- Talk about the impact you make in your community now.
- Highlight the longevity of community foundations: Your Affiliate is structured to be around for a long time.



Legacy Donor Outlook #3

“Other people like me make
choices like this.”



Legacy Donor Outlook #3

“Other people like me
make choices like this.”

- Tell stories about donors who have made legacy gifts.
- “Many people like to leave a gift to charity in wills to support causes that have been important in their lives.”
- “Last year in our area 20 people committed to making a legacy gift to our Affiliate Community Foundation.”



Your Role in Legacy Giving

- Promote Your Affiliate Community Foundation
- Make your Legacy Gift Commitment
- Listen and Connect
- Share the Opportunity of Leaving a Legacy



Your Role in Legacy Giving

- Promote your Affiliate Community Foundation
- Make your legacy gift commitment
- Listen and connect
- Share the opportunity of leaving a legacy to your community



Practice

- Following up on clues
- Promoting Legacy Giving

Scenarios in Chat
Box





How did you do?

- What did you learn?
- What was easy?
- What was difficult?
- Questions?



The Alaska Community Foundation

Wills and Estate Seminar
Thursday, Sept 30, 4:00 – 5:30 pm

Co-hosts
Alaska Community Foundation
Alaska Public Media

Presenter: Chelsea Riekkola, Foley and Pearson



Next Steps

**Make a plan to use
what you learned**

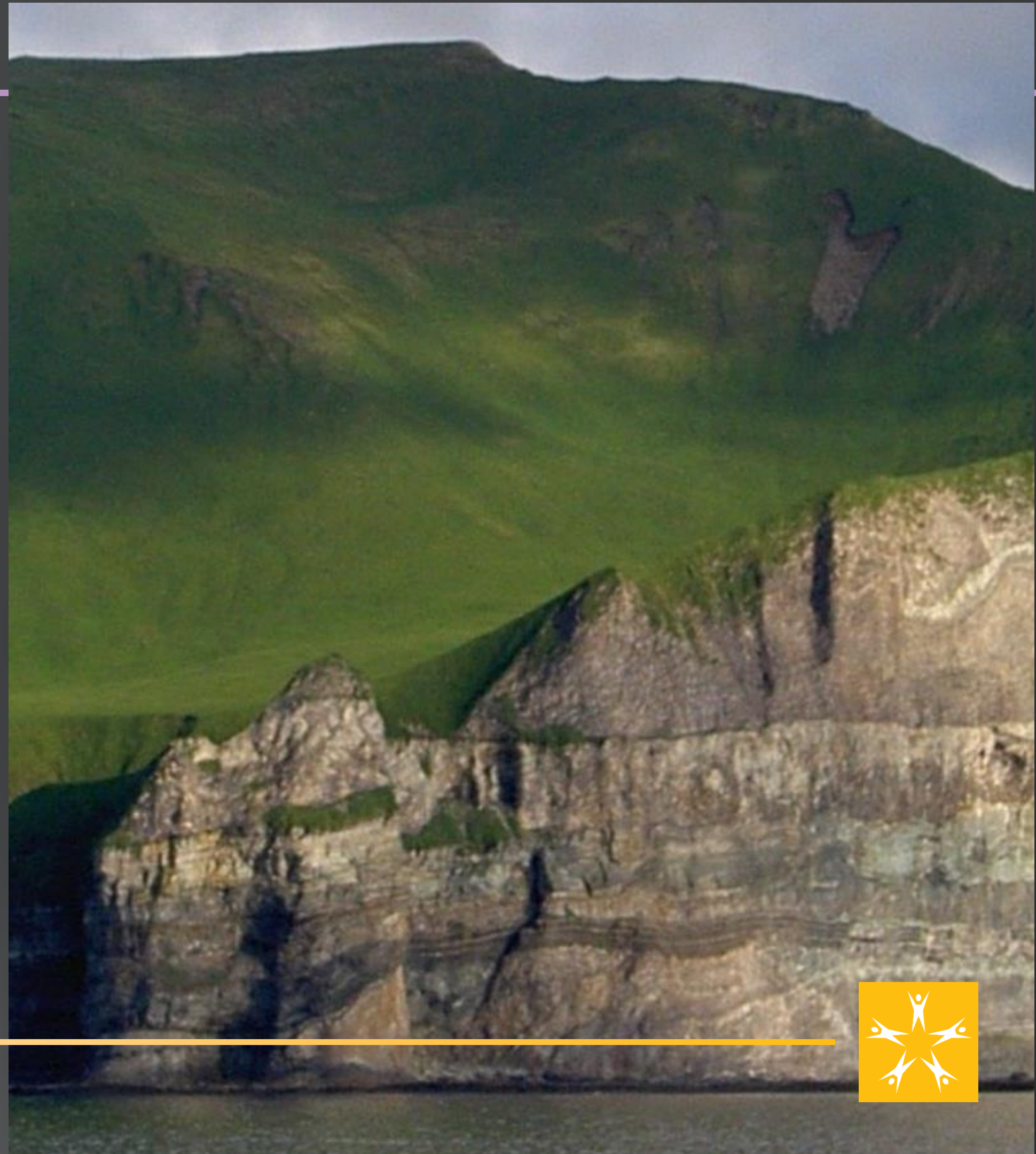
- Realistic and proactive plan
- Local Wills/Estate Planning Seminar
- Talk about it at Board Meetings
- Highlight legacy donors in newsletters
- Steward legacy donors



The Alaska Community Foundation

Next Steps

Make a Plan



The Alaska Community Foundation

Thank you!
Evaluation to be emailed to you



Why Do Donors Leave a Legacy Gift?

- Passion for a Cause
- Legacy of Their Values
- Recognition in Perpetuity
- Tax Considerations

