



## Nonprofit Toolkit

### Website Language

A legacy gift (or planned gift) is a prudent and powerful way for you to help ensure our important work continues for generations to come. By including [Organization Name] in your financial planning or estate plans, you are helping... [include specifics about your mission, your programs, and/or who you serve].

***What will your legacy be?*** We'd love to share more about giving options and the impact a legacy gift will have on the future of [Organization Name]. Please reach out to [Name, Title] at [Contact Information].

[Organization Name] is a member of *Think Ahead Alexandria*, a program of [ACT for Alexandria](#). Please [click here](#) to learn more about this important initiative and how you can become a partner in sustaining the work of [Organization Name] for future generations.

### Sample Emails

#### **Initial Email**

*Subject: Your Legacy, [ORGANIZATION NAME]'s Future*

(Salutation),

This month, [Organization Name] joins with [ACT for Alexandria](#) and our fellow nonprofits in a community-wide campaign to inspire meaningful contributions in the form of legacy gifts. No matter your age, no matter your income, [Think Ahead Alexandria](#) asks you to consider: ***What will your legacy be?***

At [Organization Name] every donation matters. However, there is a powerful way for you to create a lasting impact and ensure our important work continues for generations

to come. A legacy gift (sometimes called a planned gift) allows you to fulfill your philanthropic goals, while helping us fulfill our mission. By including [Organization Name] in your financial planning or estate plans, you become a sustaining partner in helping us... [include specifics about your mission, your programs, and/or who you serve].

Many types of legacy gifts are possible for people at different ages and in different stages of life. When you look at your wealth – not just your discretionary income – there are simple ways to make an impact that costs you nothing now. You can donate a dollar amount or percentage of your estate in a will, donate retirement assets, donate a life insurance policy you no longer need, or even make a gift that pays you income for life.

**It's never too early to think about the future.** If you're interested in learning more about giving options and creating a legacy with [Organization Name], please reach out to [Name, Title] at [Contact Information]. We'd love to talk with you.

Your generosity will make an impact now, and well into [Organization Name]'s future.

Sincerely,  
[Name]

### **Follow Up Email**

*Subject: Ready to create a legacy with [Organization Name]?*

(Salutation),

Last month you received an email about a simple yet significant way for you to make a difference here at [Organization Name]. Legacy giving is a prudent donation with the power to impact the future of our mission and programs. Gift planning is for everyone, you just need a passion for [insert specifics about your mission, your programs, and/or who you serve].

[Organization Name] is a member of [Think Ahead Alexandria](#), a city-wide initiative to encourage donors to make legacy gifts, or planned gifts, to the organizations most important to them. Your legacy gift will bolster our organization and sustain our good work for future generations.

***What will your legacy be?*** If you're ready to discuss giving options, please let us know. We'd love to share more about the impact a legacy gift will have on the future of [Organization Name]. We can be reached at [Contact Information].

Thank you for your generous support and for thinking ahead with us.

Sincerely,  
[Name]

## **Sample Social Media Posts**

### **Facebook**

No matter your age, no matter your income, you can make a meaningful investment in the future of [Organization Name]. Your generosity will... [include specifics about your mission, your programs, and/or who you serve]. Click here to learn more about legacy giving with us! [include webpage] #ThinkAheadAlexandria

Make [Organization Name] part of your legacy. Planned giving, or legacy giving, is a simple yet significant way you can make a difference in... [include specifics about your mission, your programs, and/or who you serve]. When you look at your wealth – not just your discretionary income – there are simple ways to make an impact that costs you nothing now. You can donate a dollar amount or percentage of your estate in a will, donate retirement assets, donate a life insurance policy you no longer need, or even make a gift that pays you in come for life. Your legacy gift will bolster our organization and sustain our good work for future generations. Find out more: [include webpage] #ThinkAheadAlexandria

[Organization Name] is proud to join with our fellow Alexandria nonprofits in a community-wide effort with @ACTforAlex. Think Ahead Alexandria asks you to consider: What will your legacy be? Create a legacy with a planned gift to [Organization Name] and you'll help support the future of our mission and programs - now and for years to come. [include webpage] #ThinkAheadAlexandria

At [Organization Name] every donation matters. However, there is a powerful way for you to create a lasting impact and ensure our important work continues for future generations. A legacy gift allows you to fulfill your philanthropic goals, while helping us

fulfill our mission. Consider your legacy and find out more here: [include webpage]  
#ThinkAheadAlexandria

We're thinking ahead, and you can too! By including [Organization Name] in your financial planning or estate plans you are helping... [include specifics about your mission, your programs, and/or who you serve]. Your generosity will make an impact now, and well into [Organization Name]'s future. Click here to learn more about legacy giving with us! [include webpage] #ThinkAheadAlexandria

## **Twitter**

Generosity comes in many different forms. Make a lasting investment with [Organization Name]. [Link to webpage] #ThinkAheadAlexandria

What will your legacy be? No matter your age, no matter your assets, you can make a difference. Create a legacy with [Organization Name]. [Link to webpage]  
#ThinkAheadAlexandria

It's never too early to think about the future. Learn more about giving options and creating a legacy with [Organization Name]. [Link to webpage] #ThinkAheadAlexandria

A legacy gift allows you to fulfill your philanthropic goals, while helping [Organization Name] fulfill our mission. Find out more: [Link to webpage] #ThinkAheadAlexandria

Legacy giving = a prudent and powerful way to impact the future of [Organization Name]. Let's connect about your giving options: [Link to webpage]  
#ThinkAheadAlexandria

## **Additional Information**

### **About Think Ahead Alexandria**

With the intention of creating enduring and sustainable support for our nonprofit partners and the constituents they serve; Think Ahead Alexandria is a community-wide effort to inspire meaningful contributions to nonprofits across the city. Like Spring2ACTion, Think Ahead Alexandria is a platform that facilitates giving to Alexandria's nonprofits. A cohort of nonprofit partners will engage their donor bases in

conversations around legacy giving and ACT will support them with strategy support, resources, and tools.

## **What is Legacy Giving?**

Legacy giving is the practice of creating a meaningful philanthropic legacy by designating a significant gift to a charitable organization during life or through an estate plan. Some planned gifts provide life-long income to the donor. Other gift plans use estate and tax planning to provide for beneficiaries (nonprofits or family) in ways that maximize the gift and/or minimize its impact on the donor's estate. These can be gifts of equity, life insurance, real estate, personal property, or cash.

## **Benefits**

### ***For Donors***

- Legacy gifts can become part of a donor's life story, ensuring their generosity and commitment to your cause are remembered beyond their lifetime.
- Legacy gifts can help donors "age well" as they find a new sense of pride and purpose later in life.
- Legacy gifts often offer donors the opportunity to leave a major gift that they may not have been able to make in their lifetime.
- Depending on the type of gift, legacy gifts offer several tax benefits to the donor.
- Many types of legacy gifts are possible for people at different ages and in different stages of life.
- When you look at your wealth – not just your discretionary income – there are simple ways to make an impact that costs you nothing now. You can donate a dollar amount or percentage of your estate in a will, donate retirement assets, donate a life insurance policy you no longer need, or even make a gift that pays you in come for life.

### ***For Organizations***

- Legacy gifts add a new revenue stream with a high ROI (return on investment).
- Legacy giving offers the opportunity to broaden your donors base, attracting individuals who want to do more than write a check to your organization.
- Legacy gifts open the door to deeper connections with your donors, as you really get to know them, their interests, and passions.

## Starting the Conversation About Legacy Giving with Your Donors

**First, consider the impact.** Make sure you can answer the question: *How will a legacy gift impact the future of your organization?* Think about the stability and sustainability a gift of this size would provide and how it could impact your long-term goals (such as the ability to create a new program, expand your reach, start an endowment, etc.)

**Take baby steps.** Asking a person for a legacy gift shouldn't be the first conversation you have with a donor. Get to know them, their interests, and why they choose to support your cause. Listen for clues so you know how and when to make the ask.

**Avoid talking about death.** Typically, organizations will not receive a legacy gift until a person passes away, but most people don't like thinking or talking about death. This can make a donor uncomfortable and avoid the conversation. Instead, focus their attention on "creating a legacy" (rather than "leaving a legacy") by supporting the cause most important to them.

### Sample questions to get your donors talking:

- What first drew you to our organization?
- What inspires you most about giving? What inspires you most about giving to our organization?
- What do you consider most significant about the work we're doing?
- What keeps you awake at night? How would you like to make a difference in our community?
- Where do you see our organization in 50 years?
- If you could change one thing about [something specific related to your cause, mission or those you serve], what would it be?
- If there were no limits, what would you like to do with your giving?
- If you were to make a significant gift, is there a particular area or program you'd want your gift to support?

### Other things to think about....

- **Program promotion.** Many legacy giving programs have a special name, such as [Name] Giving Society or [Name] Legacy Circle. *Will your legacy program have a special name?*
- **Donor recognition.** Some planned giving programs offer donors special benefits. *Will your program recognize legacy donors in a special way?* (Examples: in annual reports, on your website, etc.)