

“ESTATE PLANNING: SIMPLE STEPS TO SUCCESS!”

Dear Friend,

If your organization doesn't have an Estate Planning Program or Legacy Society, then you really need to consider them soon. They're easy to set up. They're important for the strength and growth of your organization. And if you're not receiving these bequests, someone else is! Take a look at these basic facts and you'll see why you need an Estate Program/Legacy Society. Simply stated, estate planning work obtains the gifts; legacy society work keeps and grows the gifts!

The largest gifts to an organization, any organization, come through estate bequests!

THE AVERAGE *UNSOLICITED BEQUEST* IS \$35,000; THE AVERAGE *SOLICITED BEQUEST* IS 200,000! LARGER BEQUESTS COME THROUGH ACTIVE SOLICITATION.

90% of estate gifts are given through simple bequests.

From 1998 to 2052, a minimum of \$41 trillion will be transferred from one generation to the next. (Scherisch, 2000)

Of 20,000 donors over age 50, less than 9% have an estate plan. (James, 2006)

Here are some simple steps:

- Talk to your Director about forming or strengthening an Estate Planning/Legacy Society.
- Educate yourself about the simple basics; the lawyers know the rest.
- Recruit a leadership committee of five, ten or twenty passionate people.
- Ask the leadership committee to take the step of naming your organization in their wills. Once they've indicated you're in their wills, you have a Legacy Society! A Legacy Society is simply a group of people who've indicated that you're remembered in their wills.
- **For the Estate Planning Program, do at least the following:**
 - 1) Send three letter mailings and brochures per year with a postcard to let you know if you're in their will. Always put your organization's legal name in easy to find places.
 - 2) Hold one or two estate planning workshops per year.
 - 3) Talk about your Estate Program/Legacy Society at every board or committee meeting and every event possible.
 - 4) Make sure an ad for Estate Bequests and your legal name is in every communication sent out by your organization.
- **For the Legacy Society, do at least the following:**
 - 1) Mail personal cards on all birthdays and anniversaries.
 - 2) Have a Legacy Society social or soiree or appreciation once or twice a year.
 - 3) At each appreciation, let donors know of your future plans and solicit their feedback.
 - 4) **Consider Active Solicitation or Outreach for the largest bequests!**

VisionWorks can partner with you in:

- **Setting up and strengthening your Estate Planning Program/Legacy Society.**
- **Setting up an Active Solicitation Component of your program in which we help you identify the five key traits of large donors and in which we help you actively solicit them!**

Contact Mark Filips and VisionWorks today at 402.999.2970 or markf@VisionWorksCo.com to help you build your Estate Program/ Legacy Society and with ACTIVE SOLICITATION!