

Practice Your Planned Giving Conversation

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Emerging Philanthropy Conference

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First Case—The Unusual Gift

- ▶ You are a fundraiser for Grady Hospital in Alexandria, VA.
- ▶ You are meeting Miss Carol W. Darryl for the first time. She is 55 years old.
- ▶ She has made small regular gifts for some time totaling \$100-\$250 per year.
- ▶ She has advised you that she has “assets” she wants to use to make a bigger gift.

Second Case—The reluctant gift

- ▶ You are a fundraiser for The Julliard School in New York City, NY.
- ▶ You have scheduled a visit with Joshua Bell, a well known American violinist, conductor and alumnus of Julliard. He has no current history of giving to the school.
- ▶ He is 49 years old and you know he is very successful and dedicated to Julliard.

Third Case—The eager gift

- ▶ You are a fundraiser for a large university/medical center
- ▶ You have an appointment to meet Jack McCoy and his wife, who attended a recent gala for cancer research at the medical center
- ▶ He's a retired lawyer and alum of the Law School, age 70
- ▶ She is a retired real estate agent, age 55

Final Case

- ▶ Jill Pembroke left a message stating her interest in CGAs after she received a CGA postcard a few weeks ago.
- ▶ She has been a consistent annual donor, making \$50 gifts every year for past 40 years to Pharmacy and Medical Schools.