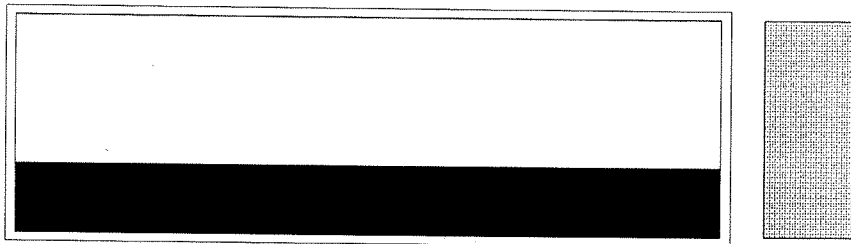


SHARING THE LEGACY: PROMOTING GIFT PLANNING THROUGH TRUSTEE ENGAGEMENT



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THE AMBASSADOR MODEL

- Ask a board member to bring up the importance of planned gifts with peers
- Can be applied to any size board
- Decide on the goal and the role of an Ambassador

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ENRICHING THE SOIL FOR SUCCESS

- What is the general understanding of legacy giving?
- Is everyone in the organization supportive of such a program?
 -
- What is the size of your staff?
- What is the scope of your gift planning program?

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GIFT PLANNING AND YOUR BOARD

- No one-size-fits-all
 -
- Know the make-up of your board
- Have you already exposed them to planned gifts?
 - Board Policies
 - Board Packet
 - Board Orientation

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CHOOSING AN AMBASSADOR

- Define the role and expectations
 -
- Develop job description
 -
- Other qualities and personality

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IDENTIFYING BOARD PROSPECTS AND STRATEGIES

Utilize a board screening

- Look at additional factors
 - Family
 - Assets
 - Estate/Financial Plans
- A gift planning strategy for each board member
- Implementing individual strategies

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ENGAGING YOUR AMBASSADOR

- Stories
- Board Meetings
- Solicitations
- Hosting and/or creating events
- Presentations
- Personal Visits
- Thanking Donors

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SUPPORTING YOUR AMBASSADOR

• **Measuring Success**-number goal, percentage goal, activity based goal

• **Checking In**-adequate support for activities, allocation of responsibilities: Who, What, Where, When, Why and How

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TROUBLE SHOOTING

- **Our Ambassador:**
 - is rarely able to attend board meeting
 - finds some of his/her fellow trustees intimidating
 - is not a good fit
 - likes to promote a specific gift vehicle/is offering unsolicited advice
- **No Trustee Legacy Donor**
- **No Legacy Society**
- **Our Executive Director is resistant to Gift Planning**

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NEXT STEPS

- **Broaden the Role**
 - Stewardship Contacts
 - Legacy Donors
 - Loyal Donors
 - High Net Worth Contacts
 - Former Trustees
 - Junior Boards/Committees

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QUESTIONS

- | | |
|--------------------------------|---------------------------|
| • Nancy A. Baker, J.D. | Abby Favro |
| • External Relations - Pacific | Trustee Legacy Ambassador |
| • The Land Trust Alliance | Manager |
| • 1000 Cordova Place, #518 | The Nature Conservancy |
| • Santa Fe, NM 87505 | 286 North Illinois Street |
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