Donors’ Lives, Donors’ Legacies: How Legacy Letter Writing Can Lead to Deeper, More Meaningful Planned Giving Conversations

Sophie W. Penney, Ph.D.
Whether your donor’s focus has been on her or his life’s work
Serving as a Volunteer
Been grounded in Faith
Or belief in a

Higher Power
Whether they have focused on
Family
However “family” might be defined
Everyone wants to know and to tell others

My Life Mattered!
Legacy Giving Study . . .

Everything Research Can Tell Us About Legacy Giving in 2018

Authors:

Dr. Claire Routley
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Commissioned by Legacy Voice
Motivation for Writing a Will

“What has been my life narrative?”

What do I want to pass on (or how might I want to be remembered)?
LegacyVoice Study Indicates

“The act of reminiscence can be very powerful for older people. Research has shown that those older adults who use their autobiographical memories reported higher rates of using those memories to direct their behaviour, to enhance social bonds, and to enhance a sense of self continuity”.

(Bluck, et al., 2010)
And this from Sofii . . .

“When thinking about legacy giving, two areas of our brain light up — the precuneus and lingual gyrus. These are both found at the back of our brain and form part of our visual memory system. The precuneus is often known as the ‘mind’s eye’ and is used when taking a third-person perspective on oneself.”

From Legacies, they’re nowt to do with thee!* Sofii
What Does Dr. Russell James Think?

“Russell hypothesises that legacy giving is essentially a ‘visualised autobiography’ — a reflection on our life, our loves and our values; in choosing the people and nonprofits we want to pass our inheritance to we essentially write the final chapter in our life story.”

From *Legacies, they’re nowt to do with thee!* Sofii
So Why Legacy Letters
What is a legacy letter/ethical will?
Ethical wills/legacy letters touch on

• Who and what mattered
• Beliefs and/or values
• Love or admiration for family, friends, fellow members of a church or volunteer group
• Hopes for future generations
Why write a legacy letter?

Honor the past

Capture the present

Inform the future
Start with three questions
What format might a story take?

• Letter
• Video
• Artwork
• Musical number
• Photo Book
One can be **Creative**
or traditional
Ties to Philanthropy/Fundraising?
Ties to Philanthropy/Fundraising?

• Lead to discussion about organizations person contributed to and why.

• Clarifying and listing one’s values can lead to connecting donor to NPO priorities and prompt a gift.
Ties to Planned Giving?

• Stewardship of donors who have already made planned gifts

• Informing family members of the reasons why a donor chose to make a gift

• Lead to a family legacy gift in honor/memory of the donor
Is there anything that you want to do;

That is important as an act of caring for others

That you can do better through philanthropy than government or commerce;
That enables you to identify with the fate of others,

Express gratitude for blessings and

Achieve deeper personal happiness, i.e., effectiveness and significance

For yourself and others at the same time?

Paul Schervish
Resources


• *Who Gets Grandma’s Yellow Pie Plate*, University of Minnesota Extension.
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Contact me . . .

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