



## Shaking the tree:

5 Ways to Jumpstart your Legacy Program

October 18, 2018

@kimberleycanada @npp\_erie

# Welcome





# Agenda

- Love Story
- Five things that worked
- Donor stories
- Innovation

# About You





# A Love Story

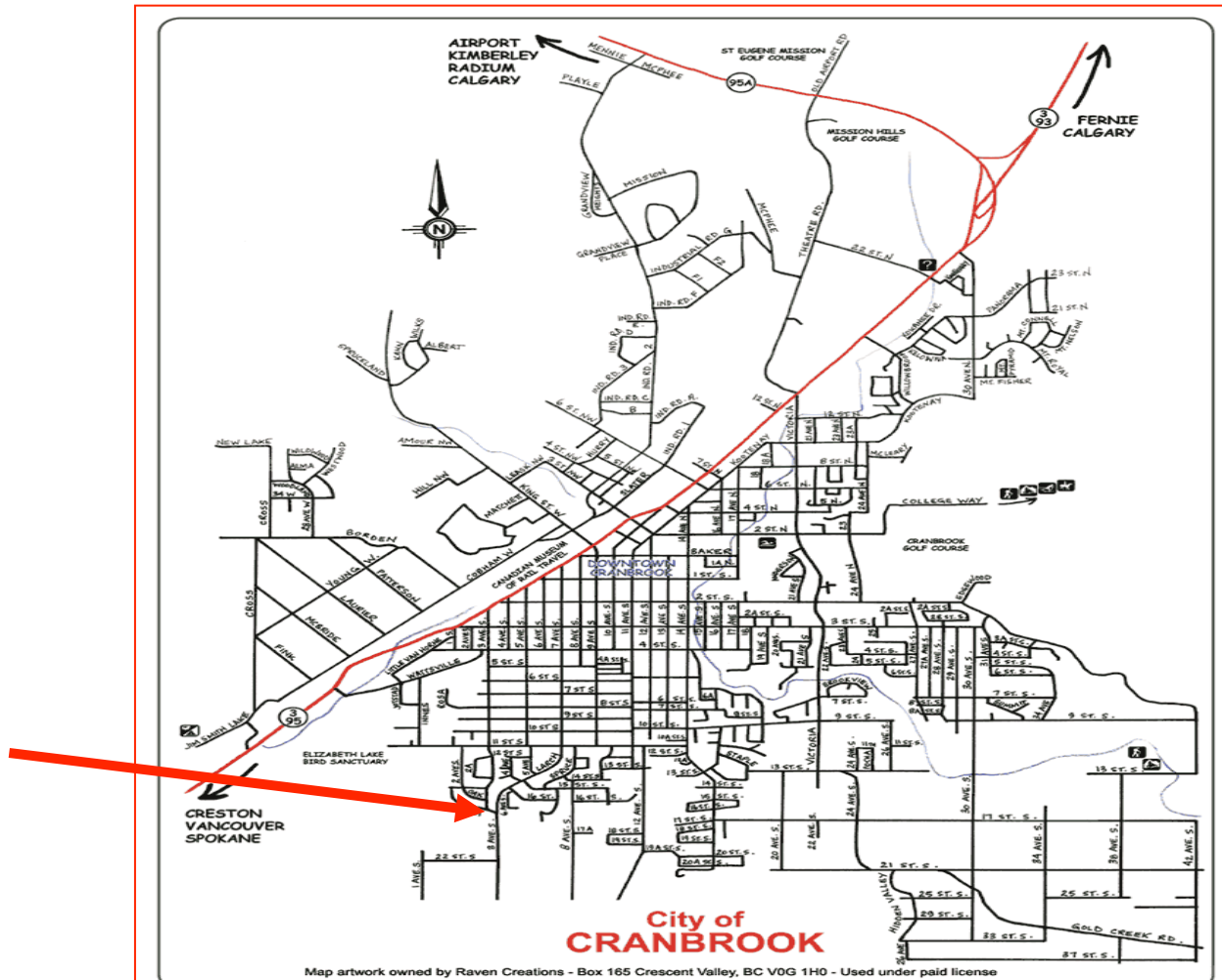


# Where I'm from





# My House























# Everything we do, we do for our donors

- Be obsessive
- Put their interests first
- Constantly think from their perspective
- Advocate for them daily
- Serve them in all we do
- Love them





donors who care. a lot.

donors who  
care. a little.

donors who  
don't care. yet.

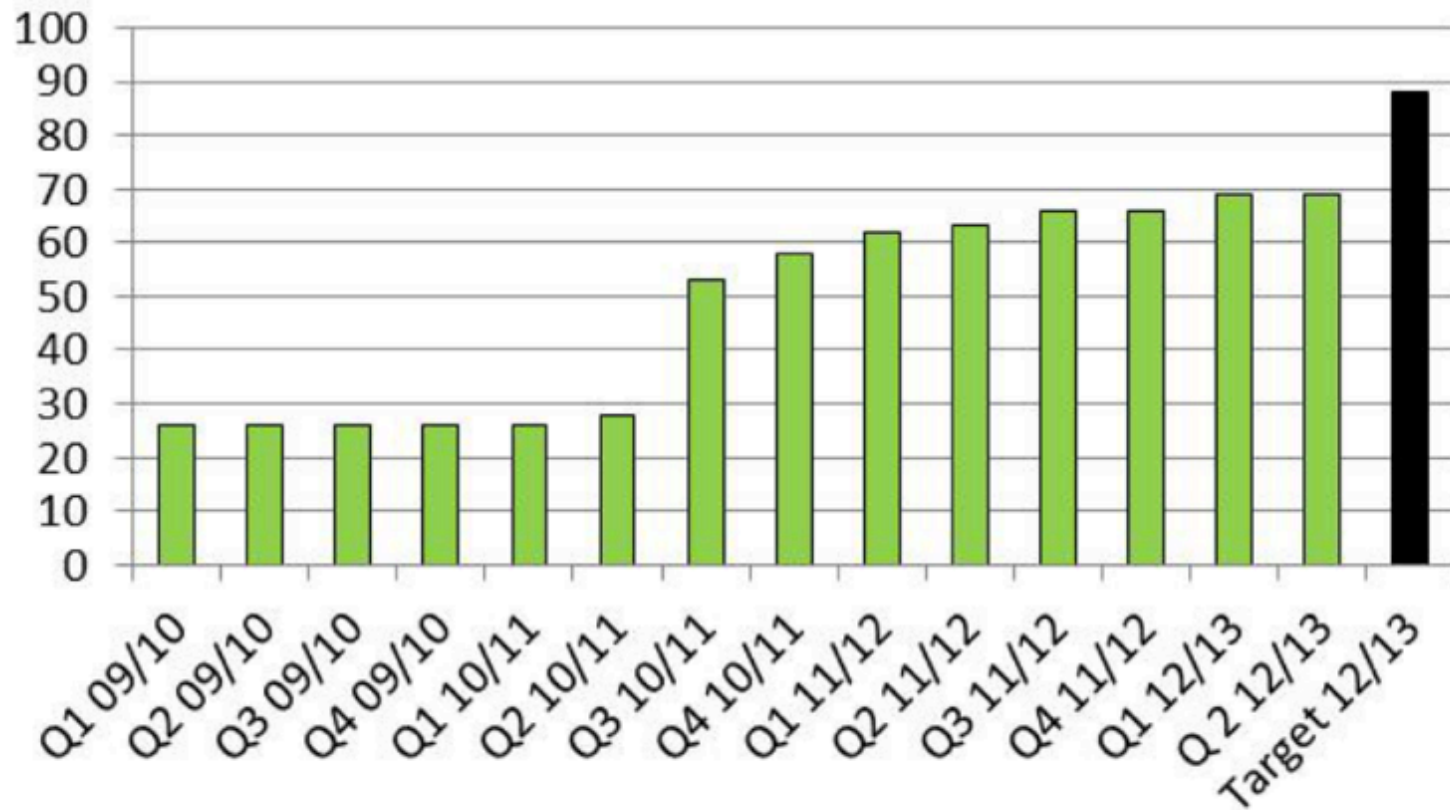


# Case Study

- Successful revitalization of Legacy program
- In 3 years confirmed or secured 69 Legators
  - Average gift of \$50K = \$3,450,000
- Over 3.5 million pledged from 5 Individuals
  - (including my first \$1,000,000 gift - woo hoo!)
- Legacy giving became part of everything we did
- Organization now averages about \$500K in bequest revenue per year.



## No. Confirmed planned gifts



Of all channels, legacy fundraising focuses  
even less on \$\$\$\$







# [http://en.wikipedia.org/wiki/ Planned\\_giving](http://en.wikipedia.org/wiki/Planned_giving)

**Planned giving** (less commonly known as gift planning is an area of fundraising that refers to several specific gift types that can be funded with cash, equity, or property. These gift vehicles are commonly based on United States tax law, but Canada, the United Kingdom, and other nations are beginning to establish similar laws. In the United States the specific rules of planned giving are defined by the United States Congress and the Internal Revenue Service.

"A donor usually considers a current gift to your institution as a cash outlay now. To make a deferred gift, a person decides to give at some future date, either a number of years from now or at death. A deferred gift is a present decision to make a future gift, evidenced by a legal contract.

# Traditional thinking...

- Get Board approval
- Find out legal name
- Appropriate due diligence
- Gift Acceptance Policy
- Brochure or Fact Sheet

# And more...

- Marketable Securities
- Planned Giving Society
- Responsibility
- Budget
- Administration of Bequests



# And more...

- Continuing Education
- Professional Advisors
- Track Expectancies
- Marketing
- Respond
- Ramping up
- Budget

# Or....What I did

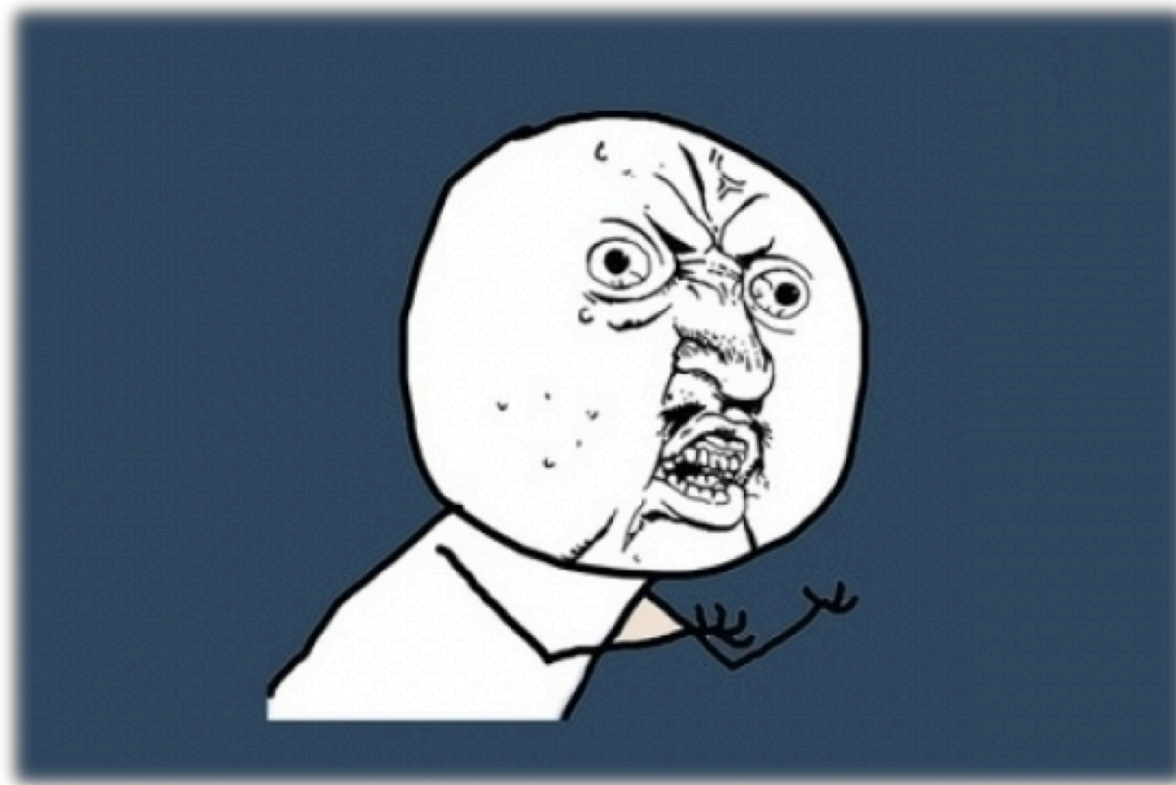
1. Internal support
2. Started a conversation with donors
3. Provided motivation
4. Engaged in meaningful ways
5. Honed soft skills

# Simplify - Focus on bequests





# Why don't you understand?!



# 1. Getting internal support

- Suggest investment from current bequest revenue
- Ask “expert” to speak to your board
- Present a plan that will have minimal impact on operations
- Involve board members in the program

## 2. Start the conversation







## For Nature, **Forever** Leave A Lasting Legacy

You can protect Ontario's wild species and wild spaces forever by remembering Ontario Nature in your Will.

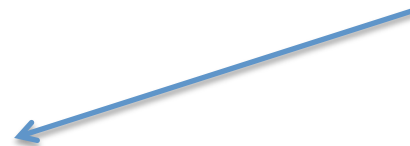
You are invited to connect with Kimberley MacKenzie, our Director of Development, for a confidential discussion about your legacy options. You can reach Kimberley at 416-444-8419 or 1-800-440-2366 extension 236, or by email at [kimberlym@ontarionature.org](mailto:kimberlym@ontarionature.org).



214 King Street West, Suite 612, Toronto, ON M5H 3S6  
phone: 416-444-8419 toll free: 1-800-440-2366 [ontarionature.org](http://ontarionature.org)

Charitable # 10717-0953 888001

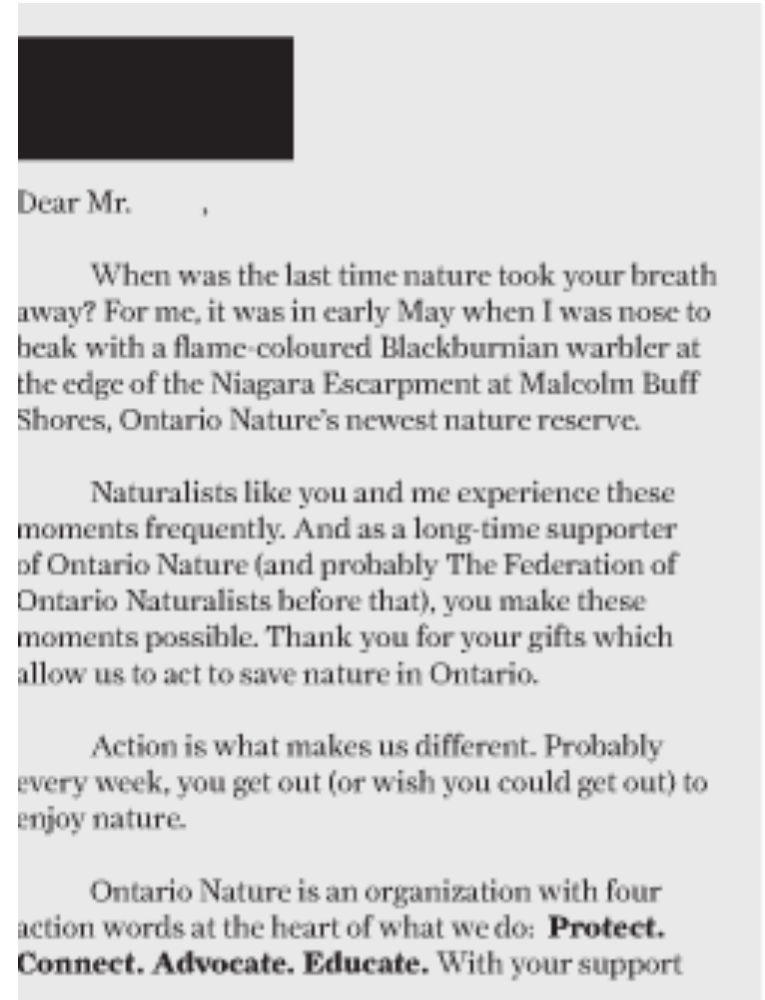
People give to people



Sent 4,275 Surveys

As a question about  
them:

*“When was the last time  
nature took your breath  
away?”*



366 Adelaide Street West, Suite 201, Toronto, ON M5V 1R9  
phone: 416-444-8419 toll free: 1-800-440-2366 [ontariounature.org](http://ontariounature.org)

Over hope for the future: “How about a future where....”

Make is soft.  
“This letter asks you to join them.”

Address their concerns: “Of course you will want to take care of your family first.”

How about a future where more people in Ontario create on-the-ground naturalist clubs? A future of connection.

How about a future where lawyers and judges act for nature in the courtroom. A future of advocacy.

How about a future where more children experience the magic of nature? A future of education.

Protect. Connect. Advocate. Educate. These actions will remain at the core of what Ontario Nature does. In 10, 20 even 50 years, we will still act for nature.

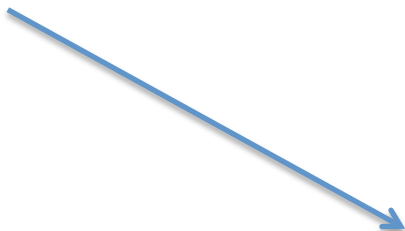
Ontario Nature has a number of generous individuals who have remembered nature in Ontario with a gift in their Will. These generous donors are in our exclusive **For Nature Forever Circle**. They still make regular gifts to our work. But they went the extra step and put Ontario Nature in their Will. This letter asks you to join them.

Making a legacy gift is a personal decision. Of course, you will want to look after your family first. But after these commitments are made, you can leave a gift to nature.

Your legacy for nature is surprisingly easy to establish and can have no effect on your current financial situation.

With this letter, you will find your special reply form. The first part, the Confidential Reply, asks you to consider leaving a gift in your Will to

Tell the donor WHY to  
make a bequest...not  
HOW.



the past 79 years, we have enjoyed remarkable  
success.

**Protect:** In 1999, the Partnership for Public  
Environment protects 2.4 million hectares in Ontario.

**Advocate:** In 1971, Ontario Nature's campaign  
led to Ontario's first Endangered Species Act and  
we get a new one – the best in the country.

**Educate:** In 1987 and again in 2008, an  
Ontario Breeding Bird Atlas is published with  
Ontario Nature's leadership.

**Connect:** In 1978, groups get together to form  
Ontario Nature to protect the Niagara Escarpment.

But as Shakespeare reminds us, "the past is  
prologue." What about the future?

What kind of an Ontario do we want to  
behold? With growing endangered species  
and the spectre of global warming and unbridled  
development in parts of our province, it seems  
Ontario is under siege.

This letter is only going to a special group of  
donors at Ontario Nature. I know that you are  
concerned about the plight of nature today. I hope you  
will support Ontario Nature tomorrow.

What kind of future can Ontario Nature create?  
Imagine a future where the endangered species list



Ontario Nature. *Anything you tell us will remain strictly confidential.*

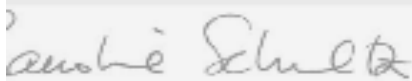
The second part, the Confidential Survey, asks a few questions about your interest in nature so that we can get to know you a bit better.

If you have any questions, please contact Kimberley MacKenzie at 416-444-8419 X 236 or email Kimberley at [kimberleym@ontarionature.org](mailto:kimberleym@ontarionature.org). She would be delighted to help you.

I began this letter asking you to remember your most recent breath-taking experience with nature. Think about that moment again and then consider leaving a legacy to Ontario Nature to ensure that these moments will be available forever.

Thank you for considering my special invitation.

For nature, forever,



Pauline Schultz  
Executive Director

After my inspiring meeting with that tiny brilliantly-coloured warbler, I became a member of the **For Nature Forever Circle** by leaving a gift in my Will to Ontario Nature. Please join me.

Remind them of shared values.

“ I began this letter asking you to remember a recent breath-taking experience...: ”





Simple


Simple

Simple

Survey



CONFIDENTIAL REPLY



☐ I have already left a gift in my Will to Ontario Nature

☐ I intend to leave a gift in my Will to Ontario Nature

☐ Please call me for a confidential discussion.  
My phone number is  
☐ Home (\_\_\_\_) \_\_\_\_\_  
☐ Business (\_\_\_\_) \_\_\_\_\_

☐ I would like more information about leaving a gift in my Will to Ontario Nature.

☐ I am not interested at this time.

PLEASE TAKE A FEW MINUTES TO FILL OUT THE  
CONFIDENTIAL SURVEY ON THE BACK OF THIS FORM.

THANK YOU

PLEASE RETURN IN THE ENVELOPE PROVIDED TO:

366 Adelaide Street West, Suite 201, Toronto, ON M5V 1R9  
phone: 416-444-8419 toll free: 1-800-440-2366 [ontarionature.org](http://ontarionature.org)



Ontario  
Nature

CONFIDENTIAL SURVEY

In order to learn what matters to you, and help us meet your expectations, we would like to know more about you and your interests. Your reply will be treated confidentially.

1. I am: ☐ Male ☐ Female

2. The year of my birth was \_\_\_\_\_

3. My interests include (please tick all that apply):

- ☐ Biking ☐ Hiking ☐ Gardening  
☐ Canoeing ☐ Bird watching ☐ Photography  
☐ Theatre ☐ Skiing ☐ Museums ☐ Camping ☐ Travel  
☐ Other \_\_\_\_\_

4. We invite you to tell us about the last time nature took your breath away, or any other reflections you have about Ontario Nature.

---

---

---

---

PLEASE RETURN IN THE ENVELOPE PROVIDED TO:

366 Adelaide Street West, Suite 201, Toronto, ON M5V 1R9  
phone: 416-444-8419 toll free: 1-800-440-2366 [ontarionature.org](http://ontarionature.org)

Important bits  
Year of birth

All about shared values and  
a chance for them to share  
their passion.



**KEEP  
CALM  
BUT  
BE  
WARNED**



# So this happened...

- "Certainly not after receiving this intrusive and insensitive material."
- "Please do not send me anymore 'ambulance chaser' messages."
- Is this sent to the "elderly" who will/should die soon?!"
- Was this message crafted by a "professional" fundraiser?

# And this...

- 9.16% response
- 392 sent back
  - 4 complaints
- Donations to cover the costs
- 28 asked for more info
- 30 confirmed legators
- 29 wanted to have a conversation

### 3. Provide motivation



# Donor centered financial planning events...

- Has NO ASK
- Engages the board
- Has many “touch points”



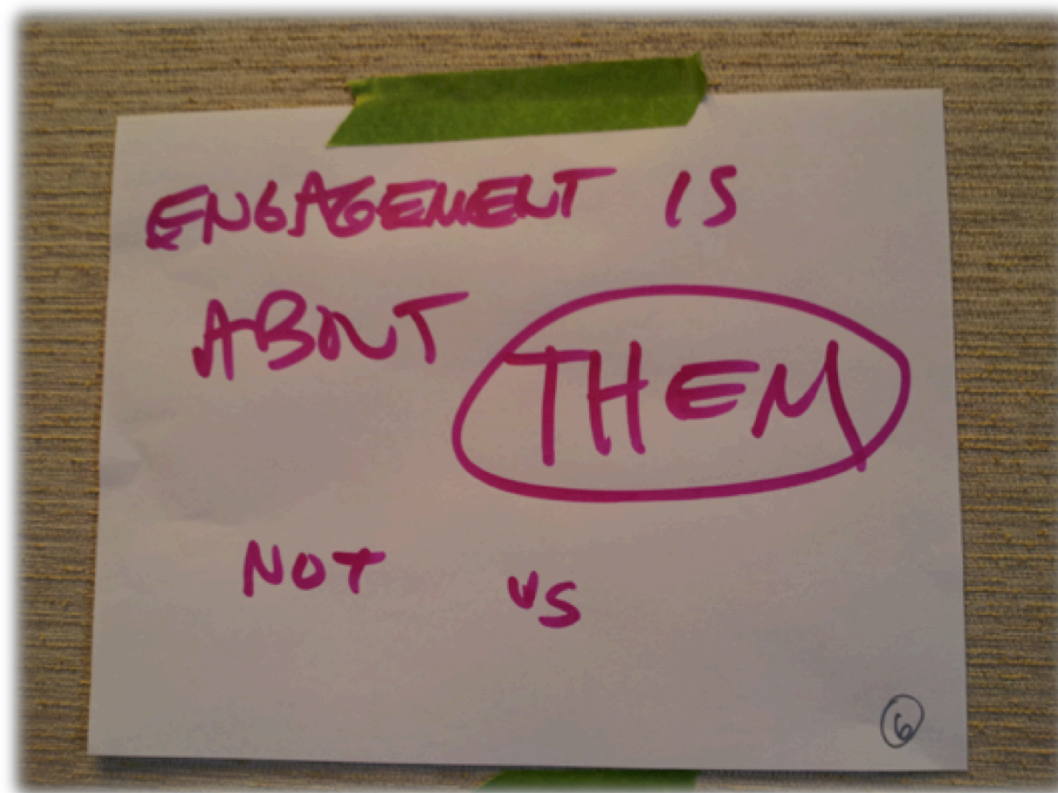
# Offered reinsurance

- There will be enough money to live on
- Can leave bulk of estate to their children
- Can reduce taxes
- Can extend their values beyond their lifetime

Feedback 100% positive

[www.donormotivation.com](http://www.donormotivation.com)

## 4. Engage in meaningful ways



*“I have a life long love of nature”*

*“Of course outing have changed...”*

*“intended for people who may not feel confident going outside hiking on their own anymore”*

*“Everyone will have a younger companion to walk with should they want an arm to hold or some company”*



April 5, 2011

Name  
Address



Dear <Jen>

As a Toronto Field Naturalist and Ontario Nature member I thoroughly enjoy getting outside and experiencing natural spaces in Ontario. I have a life long love of nature and at 83 years old I still enjoy leading walks and connecting with others who love the outdoors as much as I do.

Of course my outings have changed somewhat. It seems like just yesterday I was going on ambitious all day hikes and canoeing trips. Over the years things have slowed down a little bit, but they are by no means less enjoyable. In fact sometimes slow and quiet is even more enjoyable.

That is why I'm very happy to be working with Ontario Nature to create an outing specifically for seniors. I hope you will consider joining me for Ontario Nature's first Trillium Walk on Thursday, May 10 from 11:00 - 1:00pm.

We will be going to Sunnybrook Park at Leslie St, just north of Eglinton in Toronto. We will have a short walk to enjoy the blanket of trilliums that is usually blooming there at this time of year. We will enjoy a simple picnic lunch together and then walk back.

This field trip is intended for people who may not feel confident going outside or on nature hikes on their own anymore. We will work with you to help with transportation and will have enough volunteers to have a younger companion to walk with, should you want the company. The trail is accessible and can accommodate wheelchairs, walkers and canes. We will make washroom facilities available on site.

214 King Street West, Suite 612, Toronto, ON M5H 3S6  
T/ 416-444-8419 • 1-800-440-2866 • F/ 416-444-9886  
info@ontariounature.org • www.ontariounature.org

CHARITABLE REGISTRATION # 9337 9932 RR000





*Had one to one ratio of volunteers AND  
if letter was not appropriate it was a  
chance for more able bodied prospects  
to volunteer*

*"Of course outing have  
changed..."*

Planned giving conversation invitation!

Please consider joining me and our hosts at Ontario Nature for this very special day enjoying the company of other naturalists like yourself and the fresh lovely spring blossoms of the trilliums.

**Please RSVP to Kavita Dogra by telephone at 1-800-440-2366 or at 416-444-8419 ext 234. BEFORE April 26, 2012.**

Kavita will work with you to determine transportation, food restrictions and any other needs you may have. I look forward to seeing you on May 10, 2012.



Sincerely,

*Phoebe Cleverly*

Phoebe Cleverly  
Ontario Nature Member

P.S If you would like to volunteer to assist with this event as a driver or a companion please contact Kavita at the number above.

*Every gift in every will makes a difference, no matter how large or small.*

You are invited to connect with Kimberley MacKenzie, our Director of Development, for a confidential discussion about your legacy options. You can reach Kimberley by phone at 416-444-8419 ext. 236 or by email at [kimberleym@ontarionature.org](mailto:kimberleym@ontarionature.org)

















# Legacy Grove

Engage people  
who have pledged  
to honour those  
who have passed





Had a moment  
of respect and  
silence



Remove barriers by  
getting local wealth  
management  
company involved





Helped get  
folks active  
and connect  
with mission



Helped people  
see that their  
legacy  
was in good  
hands





## 5. Hone your soft skills

*“Soft skills get little respect but will make or break your career.”*

- *Peggy Klaus*

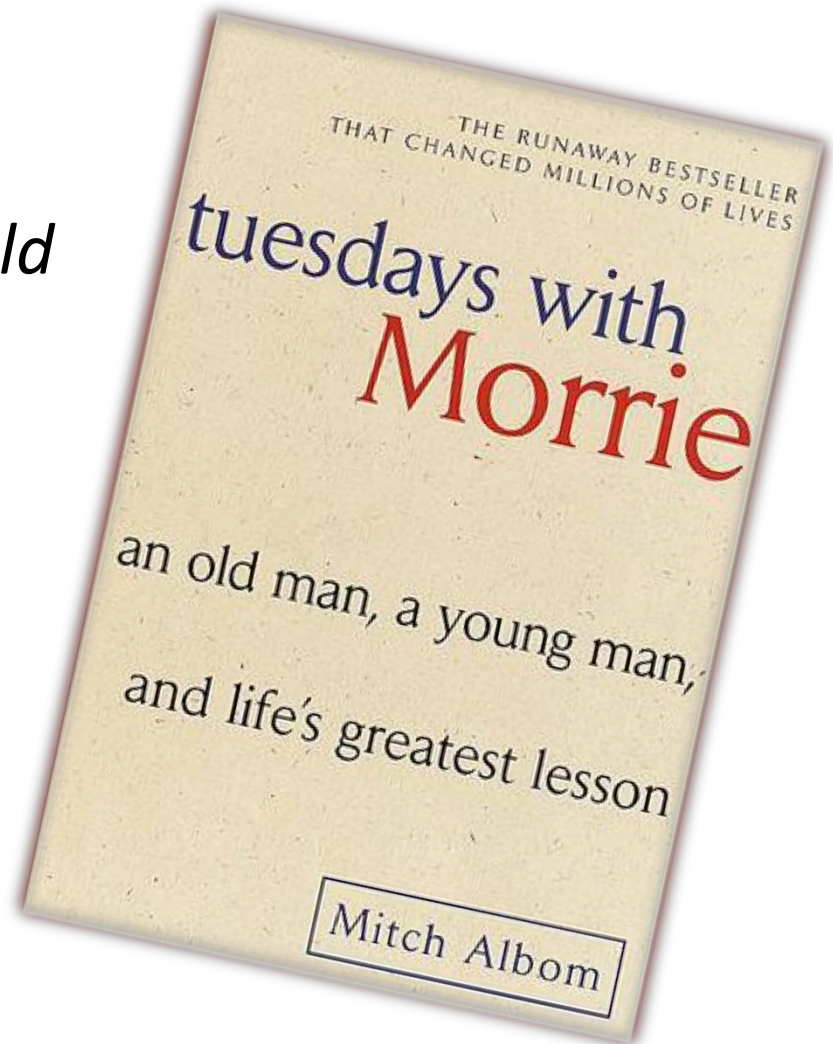
# Soft Skills

- Be authentic, empathetic and listen
- Exercise a high level of emotional intelligence
- Get comfortable and understand end of life issues
- Personalize estate files

A good death  
can be as  
beautiful as a  
good birth



*“Everyone dies but no one believes it. If we did we would do things differently”*



NOTICE OF AN APPLICATION  
FOR A CERTIFICATE OF APPOINTMENT  
OF ESTATE TRUSTEE WITH A WILL  
Form 74.7  
Courts of Justice Act

Ontario  
Superior Court of Justice

(Page 1)

IN THE ESTATE OF [REDACTED] deceased.

NOTICE OF AN APPLICATION FOR A  
CERTIFICATE OF APPOINTMENT OF ESTATE  
TRUSTEE WITH A WILL

1. The deceased died on October [REDACTED]  
The deceased person's date of birth was [REDACTED]

2. Attached to this notice are:

- (A) If the notice is sent to or in respect of a person entitled only to a specified item of property or stated amount of money, an extract of the part or parts of the will or codicil relating to the gift, or a copy of the will (and codicil(s), if any).
- (B) If the notice is sent to or in respect of any other beneficiary, a copy of the will (and codicil(s), if any).
- (C) If the notice is sent to the Children's Lawyer or the Public Guardian and Trustee, a copy of the will (and codicil(s), if any), and if it is not included in the notice, a statement of the estimated value of the interest of the person represented.

3. The applicant named in this notice is applying for a certificate of appointment of estate trustee with a will.

APPLICANT

Name

Address

[REDACTED] Toronto, ON [REDACTED]

4. The following persons who are less than 18 years of age are entitled, whether their interest is contingent or vested, to share in the distribution of the estate:

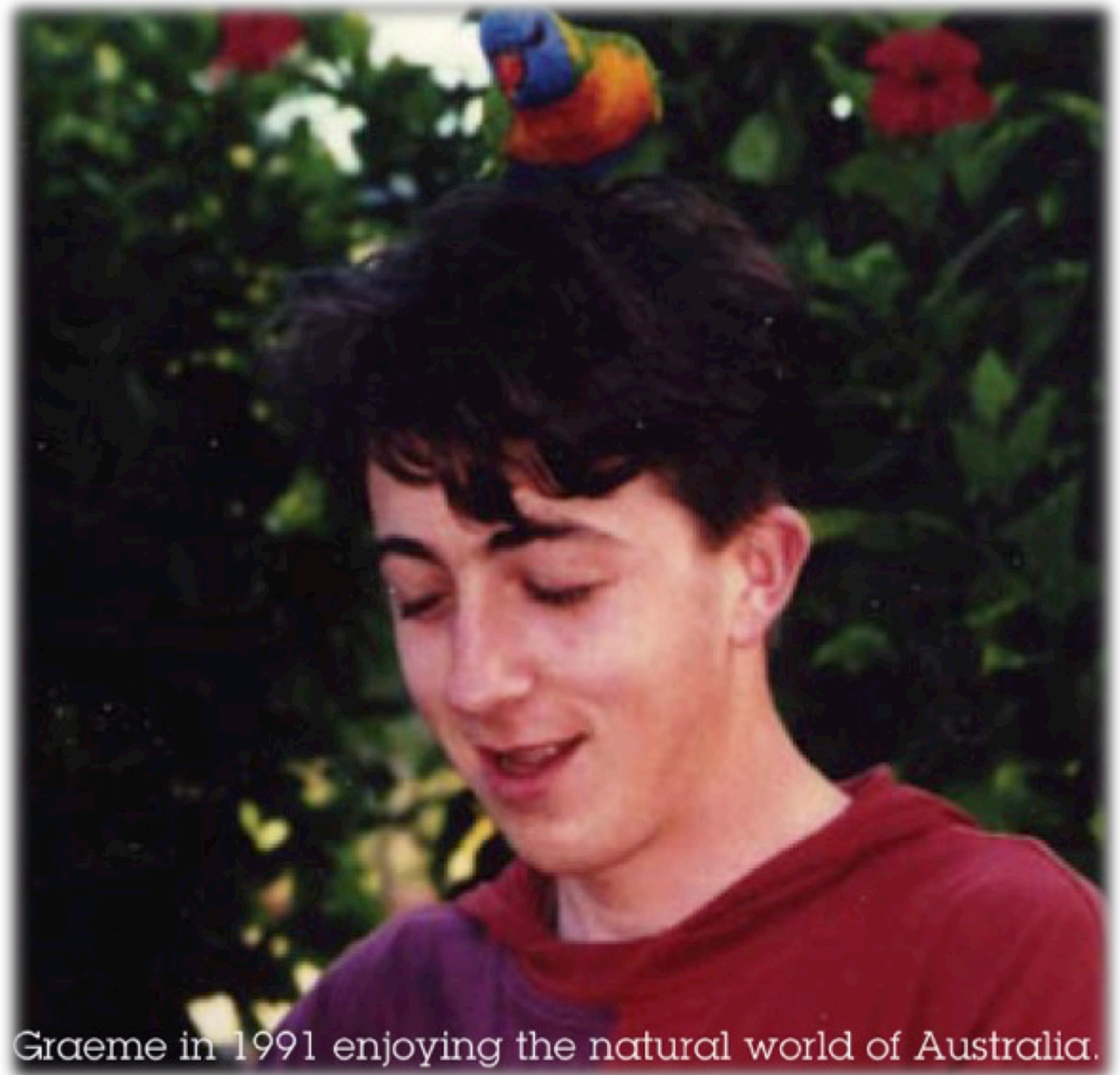
Name	Date of Birth (day, month, year)	Name and Address of Parent or Guardian	Estimated Value of Interest in Estate*
Not Applicable			

\* Note: The Estimated Value of Interest in Estate may be omitted in the form if it is included in a separate schedule attached to the notice sent to the Children's Lawyer.





Capture  
stories in  
the donor  
file.



Græme in 1991 enjoying the natural world of Australia.

# Offer peace of mind



22 Nov./09

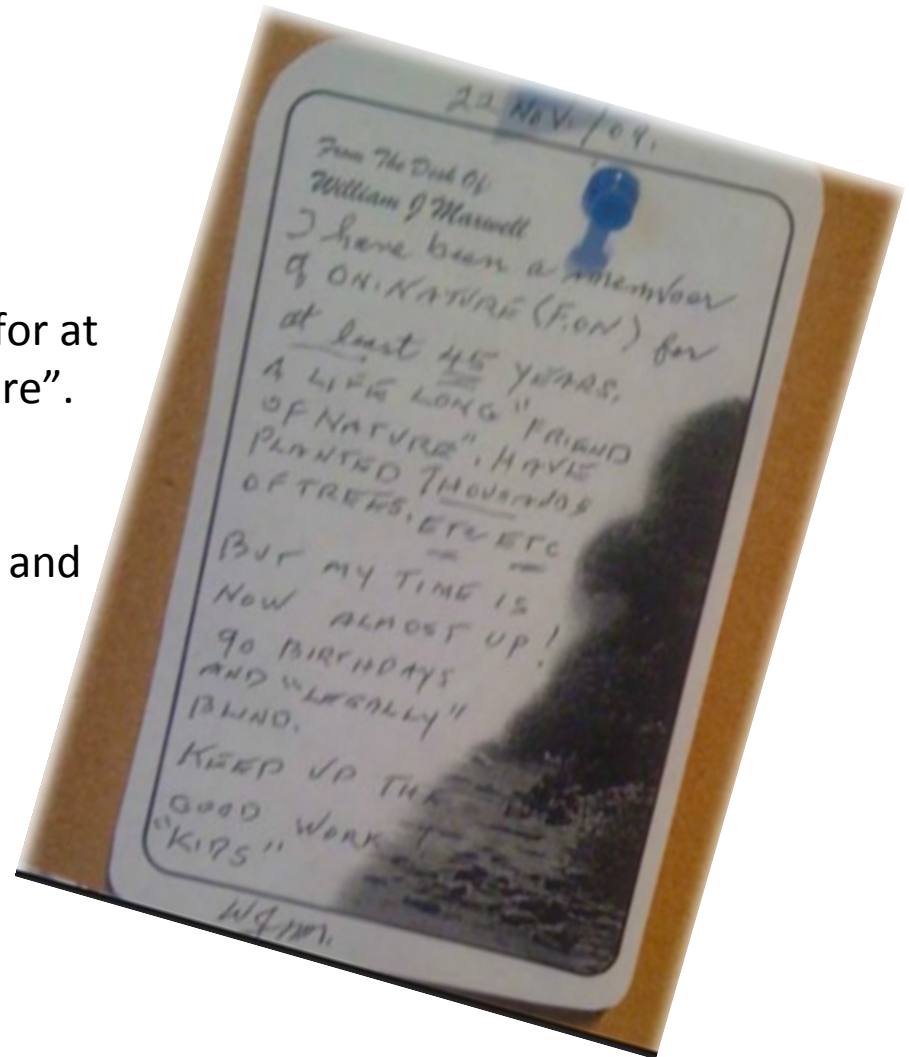
From the Desk of :  
William J. Maxwell

I have been a member of ON Nature (FON) for at least 45 years. A LIFE LONG "Friend of Nature". Have planted thousands of trees. Etc.etc.

But my time is now almost up! 90 Birthdays and "legally" blind.

Keep up the good work "kids"!

WJMx



Follow up  
again  
w/ Fred Bodsworth  
Phoned on Jan 5.  
left msg





# Start today!



## INEVITABLE

One day we will all be "Pushing Up Daisies"





Innovate

# Darüşşafaka Orphanage



Darüşşafaka Schools aim to become one of the most respected and best schools both in Turkey and the world, that provide quality education to underprivileged and talented children whose mothers and/or fathers have deceased.

















Death ends a life. Not a relationship.

– Mitch Albom

# So...

- Get your organization onside
- Start the conversation
- Consider the Donor Motivation Program
- Engage in meaningful ways
- Hone your soft skills
- Be innovative
- Start today!

Thank you!

Write: “Free Consult” on  
your card and get a 60  
minute conversation about  
you.

@kimberleyCanada

[k@kimberleymackenzie.ca](mailto:k@kimberleymackenzie.ca)

289-231-1339

[www.kimberleymackenzie.ca](http://www.kimberleymackenzie.ca)

