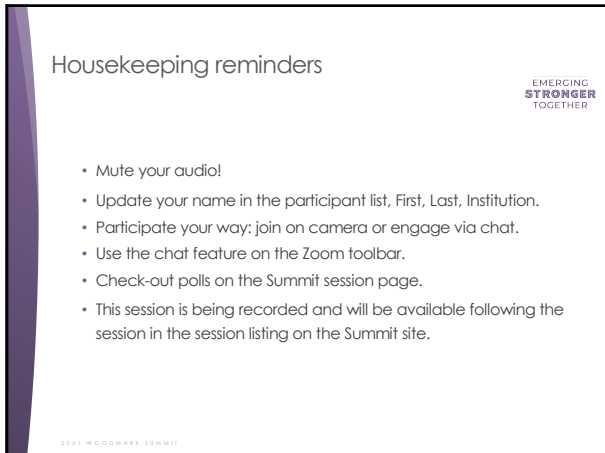
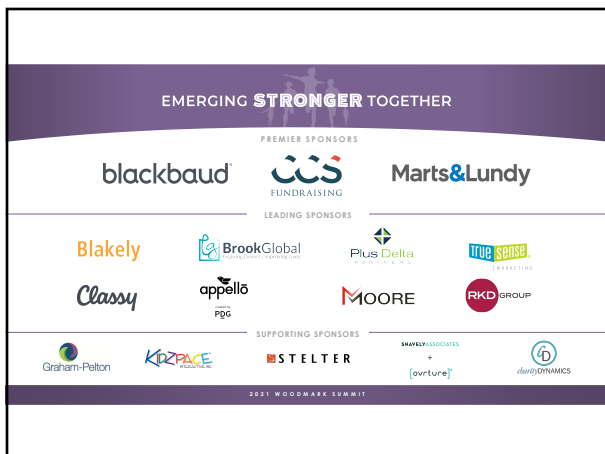


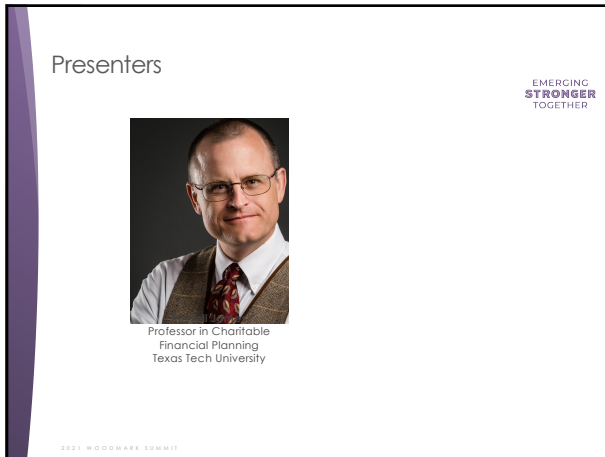
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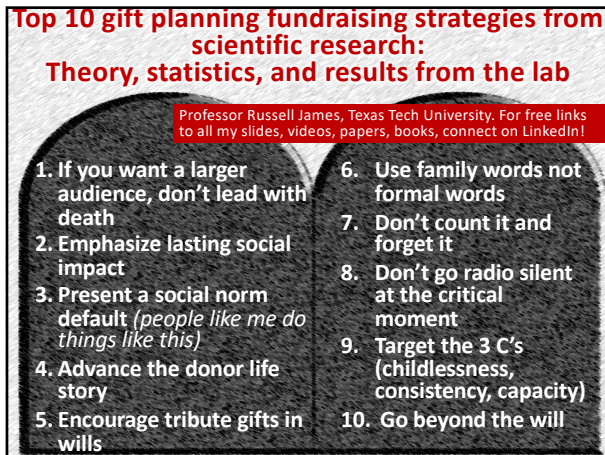
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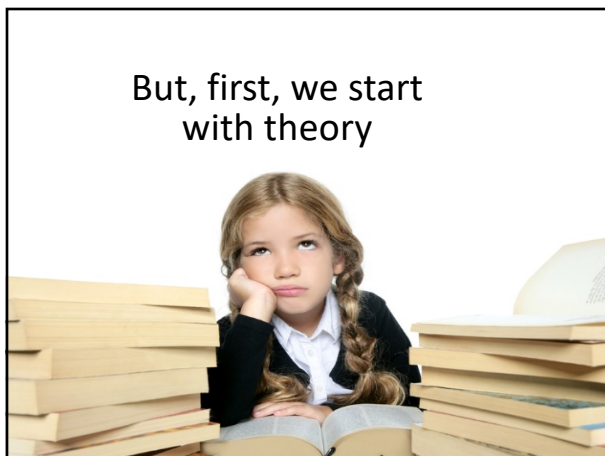
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4



5



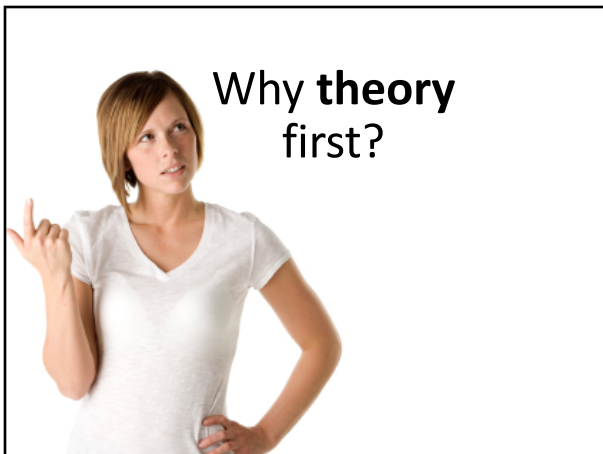
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8



9



Theory based strategies are more flexible than a list of techniques

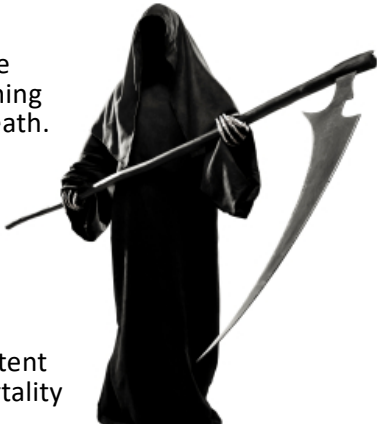
- New techniques can emerge as circumstances change
- Guides practice even where (as in bequest and major giving) interim measurement is difficult
- “Best practices” might just be “practices”
- Just because a technique “works” for one organization ...

10

What you see	What the subconscious sees
	
<p>Seminar Tonight: Estate Planning</p>	<p>Seminar Tonight: Your Upcoming Death</p>

11

- Regardless of terminology or packaging, estate planning is planning for one’s own death.
- It is a strong reminder of the reality of one’s own mortality.
- Experimental research has identified consistent reactions to mortality reminders.



12

Both economic and psychological approaches predict

1 st Stage Defense	2 nd Stage Defense
AVOIDANCE Avoid death reminders, e.g., deny one's vulnerability, distract oneself, avoiding self-reflective thoughts	SYMBOLIC IMMORTALITY Some part of one's self – one's family, achievements, community – will continue to exist after death (a form of autobiographical heroism)
	

13

Examples of avoidance


Distract: I'm too busy to think about that right now

Differentiate: It doesn't apply to me now because I (exercise, have good cholesterol, don't smoke...)

Deny: These worries are overstated

Delay: I definitely plan to think about this... later


Depart: I am going to stay away from that reminder



14

2nd stage defense:
Symbolic immortality
 (a form of autobiographical heroism)

Some part of one's self - one's name, family, community, achievements, values, goals, etc. - will persist after death



15

As personal mortality awareness grows, the desire for investing in future social impact becomes relatively more attractive



Pursuit of symbolic immortality: something reflecting the person's life story (community and values) will live beyond them

16



Death reminders increase support for one's surviving community ("in-group") and community values

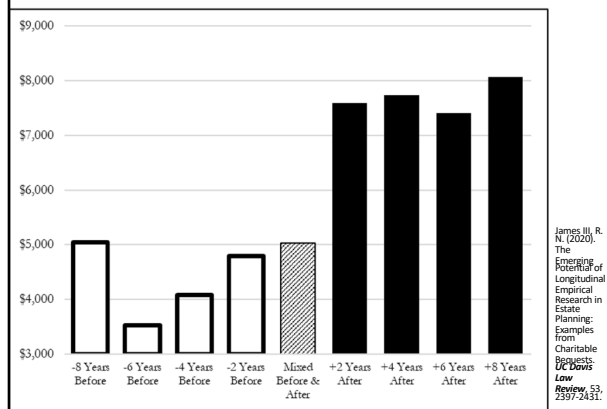
17

Enough with the academic theory...
Let's get practical!



18

Figure 1. Average Annual Charitable Donations Before and After Adding Charity to an Estate Plan



19

If you want a larger audience, don't lead with death

1. If you want a larger audience, don't lead with death
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4. Advance the donor life story
5. Encourage tribute gifts in wills
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7. Don't count it and forget it
8. Don't go radio silent at the critical moment
9. Target the 3 C's (childlessness, consistency, capacity)
10. Go beyond the will

20

Communicating Obliquely

Personal mortality topics are subconsciously aversive to most people. Wrap them in other topics to sidestep the initial avoidance response.



A common theme in several successful approaches to introducing planned giving

21

The Oblique Seminar

You "just happen" to communicate about planned giving in the context of something else

**Charitable
Estate
Planning**

Tax-smart giving

- Current giving tips
- Planned giving tips

Christians and the Law

- Religious liberties
- Stewardship/estate planning

Senior concerns

Identity theft?

"Since you're thinking about ways to protect yourself and your identity, why not think about ways to protect your estate, as well?" We ended with an abbreviated seminar on how to be sure your estate is in order (with appropriate charitable bequests in place)."
-Barbara Diehl, *Journal of Gift Planning*, 2006

Stories from the frontlines

- Charity projects
- Stories of planned donors who fund it

22

The Oblique Conversation


4 S

1. Story
2. Story
3. Story
4. Shut up

Concept from
Jeff Comfort,
Oregon State University

So, what's new at Texas Tech?


1. ... new coach ...
2. ... new building ...
3. Oh, and Mary Smith did a neat thing. Did you know Mary? She graduated two years before you... No? Well, Mary signed a new will that one day will endow a permanent scholarship for financial planning students.



23

The Oblique Survey

In the middle of an 8-10 question survey of opinions about the organization...



Many people like to leave a gift to [org] in their will to support a cause that has been important in their life. If you signed a will in the next three months, what is the likelihood that you might leave a gift to [org]? ☐ None ☐ Somewhat Unlikely ☐ Somewhat Likely ☐ Very Likely ☐ Definitely

or

Many friends of [org] like to receive a tax deduction and make a gift that pays them income for life. Rate your level of interest in making this type of gift.

☐ Will never be interested ☐ Not today, but some day ☐ Somewhat interested ☐ Definitely interested

24

The Oblique Focus Group

Bigelow & Kolmerten (*Journal of Gift Planning*, 2008) set up a donor focus group “about why no one seems willing to learn about planned giving by attending workshops ...The participants, in order to give advice about workshops on planned giving, had to ask questions about CRTs and CGAs...Thus, like scientists who discover a cure unexpectedly, we had inadvertently found our answer where we least expected it: the best venue to *teach* people about planned giving was not a workshop or a seminar but a focus group.”



25

The Oblique Investment

How is Death Insurance Sold?



26


Annuity strategies: If you want a larger audience, don't lead with death



Changing annuity description from “each year you live” to “each year you live until you die”, and “if the annuity holder lives up to different ages” with “depending on the age when the annuity holder dies” increased death-related thoughts and consequently lowered interest in purchasing annuities. The reduction in interest was fully mediated by the change in death-related thoughts.

Sullivan, L. C., & Kenyon, G. Y. (2018). Solving the annuity puzzle: The role of mortality salience in retirement savings accumulation decisions. *Journal of Consumer Psychology*, 28(3), 417-425.

27



Avoidance suggests that we don't want to admit the likelihood of impending death as a reason to act

I don't want to think about it

➡

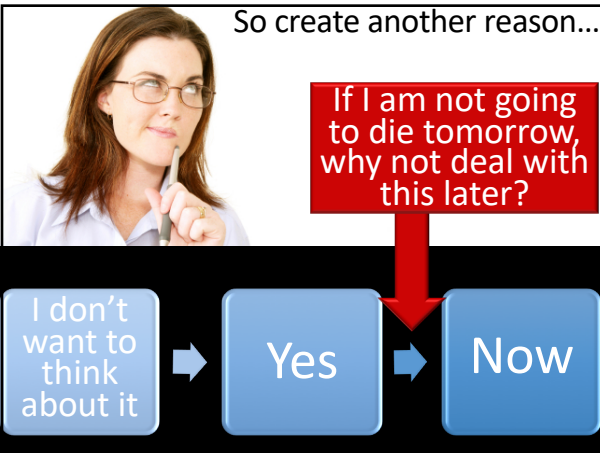
Yes

➡

Now

28

So create another reason...



I don't want to think about it

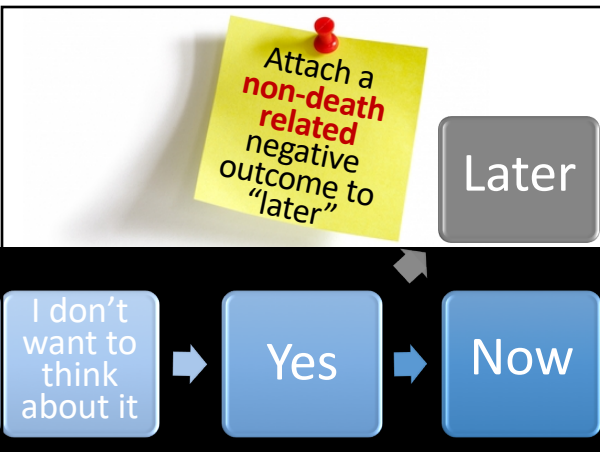
➡

Yes

➡

Now

29



I don't want to think about it

➡

Yes

➡

Now

Later

30

Our campaign to reach 100 planned gifts in wills or trusts ends in 3 months, won't you consider joining these others?

Left Out of Group

Later

I don't want to think about it → Yes → Now

31

We are offering a _____ for anyone who signs up for an appointment tonight only

No _____

Later

I don't want to think about it → Yes → Now

32

People really take their cue from leaders like you. Your action would motivate many of them to act.

Bad Example

Later

I don't want to think about it → Yes → Now

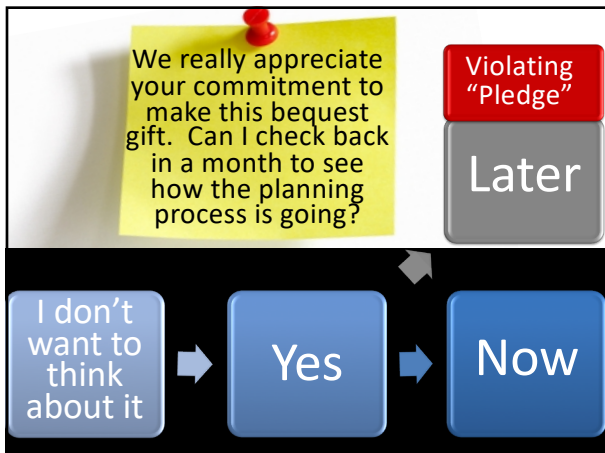
33

Pledge and follow-up

"To show a strong leadership commitment in this planned giving push, we want to announce board participation levels at the fall banquet. Can we count you in?"



34



35

Emphasize lasting social impact

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7. Don't count it and forget it
8. Don't go radio silent at the critical moment
9. Target the 3 C's (childlessness, consistency, capacity)
10. Go beyond the will

36

Strategies: When to lead with death

1. Captive audience

Increase mortality salience to heighten interest in lasting social impact through bequest

2. Low-hanging fruit

Intentionally limiting audience only to those ready for death planning (often related to some other external shock such as death of a loved one, negative diagnosis, estate planning)



37

Estate planning strategies: Emphasize lasting social impact

- Dynasty trusts, private foundations, and other long term plans become attractive
- Without planning: Big pile of money for heirs to quickly blow, violating client values.
- With planning: Lasting impact expressing client values, e.g., education for offspring, retirement for spouse, wage matching trust payments.



Something reflecting the person's life story (community and values) will live beyond them

38

Permanent Gifts

Symbolic immortality in practice



39

Pursuit of lasting social impact

A poverty relief charity was described as an organization that focused on either ...

Normal
Average
Gift



Death
Reminded
Average
Gift



"meeting the immediate needs of people" or



\$257.77

\$80.97

"creating lasting improvements that would benefit people in the future"



\$100.00

\$235.71

*participants giving share of potential \$1,000 award
K. A. Tost, L. P. Hernandez, M. & Larrick, R. P. (2012). It's Only a Matter of Time Death: Perceptions and Antecedents of Perceptions. Psychological Science, 23(7), 985-993

40

Lasting gifts (endowments, named buildings, scholarship funds, etc.) to stable organizations may be particularly compelling



41


Consider developing permanent giving opportunities for mid-level bequest donors

- Scholarships, lectureships, annual performances, perpetual child sponsorship, perpetual rescued pet sponsorship, etc.
- Virtual endowments



42

An experiment to encourage a second memorial donation



Adding a **permanence goal** increased intended giving amount by **150%**

Adding a **recognition goal** increased intended giving \$ by **50%**

See Table 3, Column 4 of Johnson et al. (2003) for details of the experiment. The photograph is of a memorial donation to a scholarship fund. An experiment of permanence goals and recognition acknowledgments.

"If total gifts exceed \$10,000 this will be recognized in the annual report as one of our highest level 'gold circle' memorial tributes."

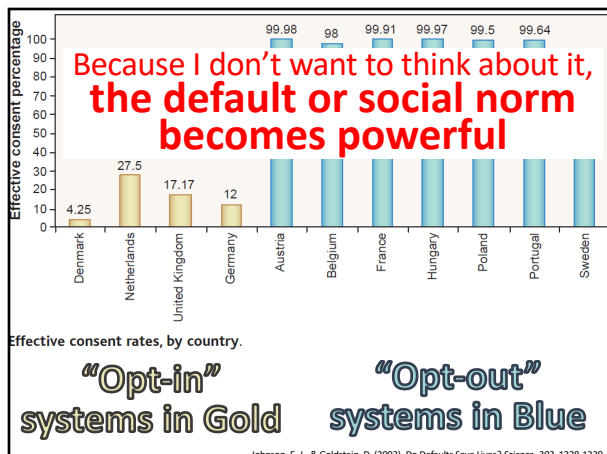
"unless total gifts exceed \$10,000 at which point this fund will become a perpetual scholarship fund"

43

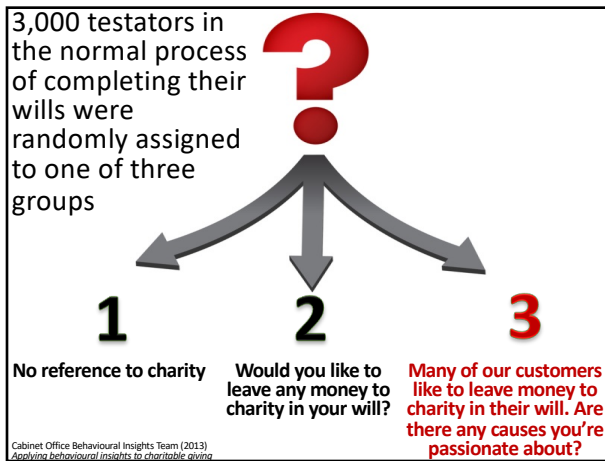
Present a social norm default
(people like me do things like this)

1. If you want a larger audience, don't lead with death
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7. Don't count it and forget it
8. Don't go radio silent at the critical moment
9. Target the 3 C's (childlessness, consistency, capacity)
10. Go beyond the will

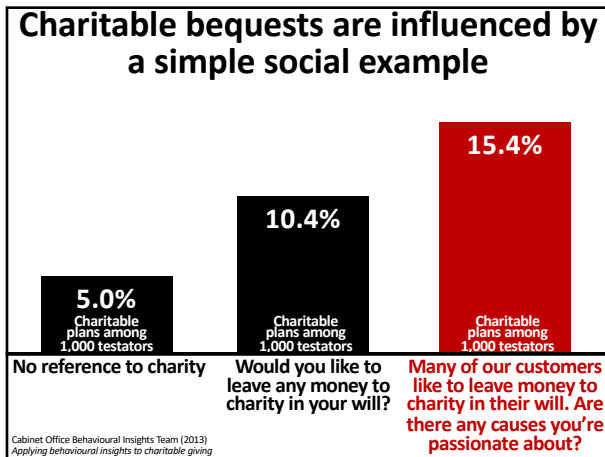
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45



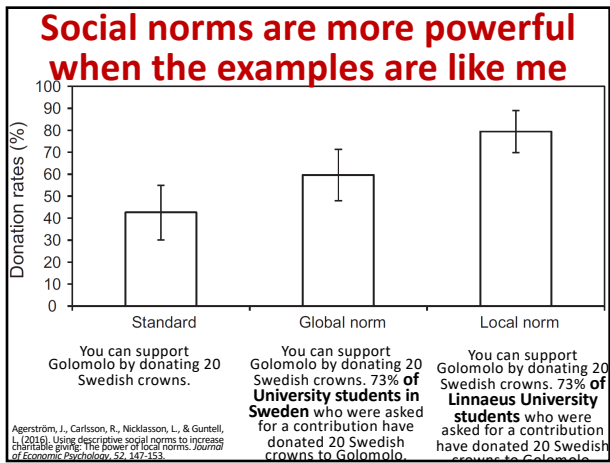
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47



48



49

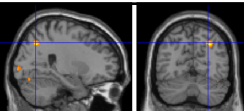
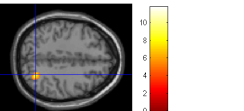
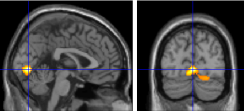
Advance the donor life story

1. If you want a larger audience, don't lead with death
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5. Encourage tribute gifts in wills
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9. Target the 3 C's (childlessness, consistency, capacity)
10. Go beyond the will

50



51


Contrast	Brain Region	MINI co-ordinates	Peak p FWE	Cluster p FWE	
(1) Beq> Give	Lingual Gyrus	-2, -78, -2	.004	.000	
	Precuneus	26, -66, 42	.102	.009	
(2) Beq> Vol	Lingual Gyrus	2, -80, -4	.007	.000	
	Precuneus	30, -66, 40	.180	.004	
	Precentral Gyrus	-34, -3, 36	.397	.001	
(3) Beq> (Give+ Vol)	Lingual Gyrus	0, -78, -4	.001	.000	
	Precuneus	26, -66, 42	.007	.001	

52


lingual gyrus is part of the visual system, damage can result in losing the ability to dream

precuneus has been called "the mind's eye," used in taking a 3rd person perspective on one's self

Visualized autobiography
visualization + 3rd person perspective on self



53



Life stories

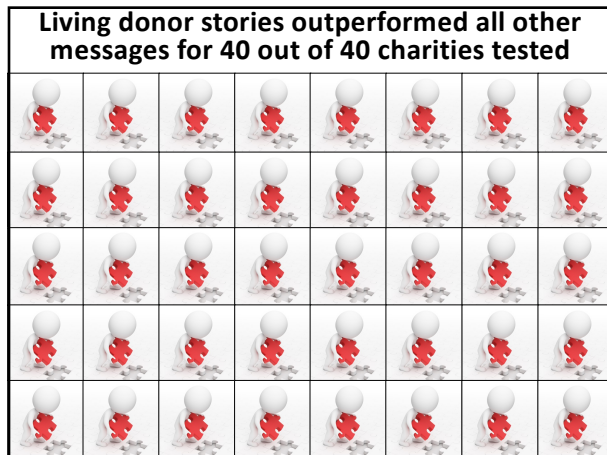
Summarizing a series of interviews with planned donors, Dr. Claire Routley wrote...

*"when discussing which charities they had chosen to remember, there was a clear link with the **life narratives** of many respondents"*


54



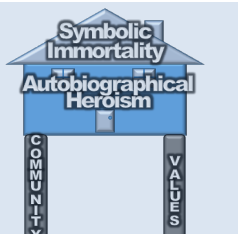
55



56



Is this cause (or charity) an important part of my life story?



57



Start with

“So, tell me about your connection to (organization).”

58



Gifts that
advance the
donor hero
story

59

Death reminders increase attraction to personal heroism

1. Death reminders after delay increase self-reported similarity with a hero
2. After a death reminder, describing one's own hero (but not another's) reduces death-related thoughts
3. After a death reminder, reading of a heroic act reduces death-related thoughts only when the hero is reported to share the participant's birthdate

McCabe, S., Carpenter, R. W., & Jochims, J. (2016). The role of mortality awareness in hero identification. *Self and Identity*, 15(6), 707-726.

Pursuit of symbolic immortality: something reflecting life story (community and values) will live beyond

60


Large gifts come with lots of instructions



- Instructions make the gift compelling
- They reflect the donor's values, life story, and identity

61

Large gifts HAVE ALWAYS come with lots of instructions



In two studies of wills from the 1800s, charitable bequests were restricted in

- 14% of small cash gifts
- 58% of real estate or large cash gifts
- 70% of gifts of a share of the entire estate

James III, R. N. (2020). American Charitable Bequest Transfers across the Centuries: Empirical Findings and Implications for Policy and Practice. Estate Planning & Community Property Law Journal, 12, 235-285.

62

Gift restrictions make gifts larger in experiments



Heims, S. E., Scott, B. L., & Thornton, J. P. (2012). Choosing to give more: Experimental evidence on restricted gifts and charitable behaviour. Applied Economics Letters, 19(8), 783-788.


63



- The most extreme version of gift instructions: Foundations, funds, and trusts.
- Pages of detailed instructions controlling the gift for decades or even generations

64

We have competition for instructions:
The private family foundation




Among decedents in 2004 and 2007 with estates of more than \$5 million, the share of charitable dollars going to private foundations was 70% and 78%, respectively

65

The magic follow-up question for escalating estate gifts

- “Have you ever thought about how you would like your gift to be used?”
- Share stories about planned gifts from another donor of a specific size (e.g., endowing a particular item)
- Permanence goals work well in estate experiments



66

Encourage tribute gifts in wills

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8. Don't go radio silent at the critical moment
9. Target the 3 C's (childlessness, consistency, capacity)
10. Go beyond the will

67

Bequest charity representing loved ones

'The reason I selected Help the Aged...it was after my mother died...And I just thought – she'd been in a care home for probably three or four years. And I just wanted to help the elderly...I'd also support things like Cancer Research, because people I've known have died...An animal charity as well, I had a couple of cats.'

"[In my will I have a gift to] the Cancer Research. My father died of cancer and so I have supported them ever since he died.'

Female, 63
widowed

Male, 89
married

(Routley, 2011, p. 220-221)

68

Testing the tribute bequest

4500+ respondents

Do you have a deceased friend or deceased family member who would have appreciated your support of an International relief organization such as CARE or UNICEF?

Also tested for living friend or family member

Alzheimer's Alzheimer's Association, The Alzheimer's Foundation

Diabetes Joslin Diabetes Center, The American Diabetes Association

Wild Birds Preservation National Audubon Society, Ducks Unlimited

Wildlife World Wildlife Fund, Wildlife Conservation Society

Minority College Fund United Negro College Fund, American Indian College Fund

Blindness related nonprofit Fighting Blindness, Prevent Blindness America

Youth-related charitable Girl Scouts, Boy Scouts, YMCA, YWCA, Big Brothers / Big Sisters of America, Boys and Girls Clubs of America

AIDS research and care San Francisco AIDS Foundation, AIDS Project Los Angeles

Animal welfare

American Society for Prevention of Cruelty to Animals, The American Humane Association

International relief UNICEF, CARE

Cancer research American Cancer Society, National Cancer Coalition, M.D. Anderson Cancer Center, Dana-Farber Cancer Institute

Guide dogs

Guide Dogs for the Blind, Canine Companions for Independence

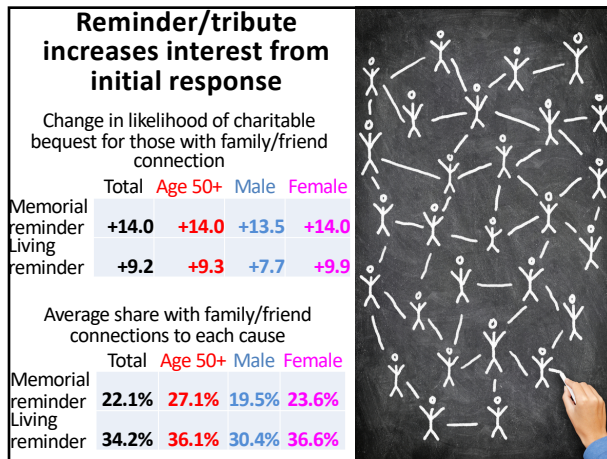
Breast cancer research

Breast Cancer Research Foundation, National Breast Cancer Foundation, Susan G. Komen Breast Cancer Foundation

If so, please state your relationship to them and write at least 25 words describing their interest in or connection with this cause.

If you signed a will in the next 3 months, what is the likelihood you might leave a BEQUEST gift **honoring a living [deceased] friend or family member to**

69



70


Simple implementations

Samples courtesy of Phyllis Freedman, President of SmartGiving and "The Planned Giving Blogger"

☒ **YES, I want to leave a personal legacy in the fight against cancer and other serious illnesses.**

☐ I have already included City of Hope in my will, as a beneficiary of a retirement account or other planned gift.
☐ I wish to remain anonymous.
 My gift is in ☐ honor of ☐ memory of _____
 Relationship: _____
☐ I wish to remain anonymous.

1 in 4 increased their intention to leave a charitable bequest when given the option to "honor a friend or family member by making a memorial gift to charity in my last will & testament"



71

Use family words not formal words

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10. Go beyond the will

72



Use family language
Stories and simple words

Social Realm (identity)
I help people because of who I am



Avoid market language
Formal, legal, or contract terms

Market Realm (exchange)
I engage in transactions by formal contract

Would you say it in a normal conversation with your grandmother?


73

Formal terms lower charitable interest

2014 Survey, 1,246 Respondents, Groups D/E

Interested Now		Will Never Be Interested
23%	Make a gift to charity in my will	12%
12%	Make a bequest gift to charity	14%

74



Describing a CRT

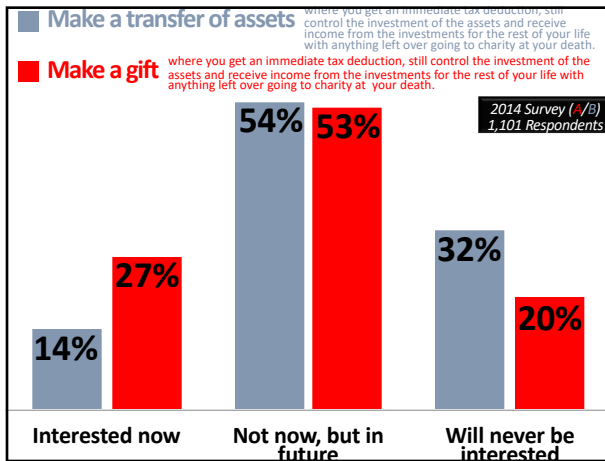
Make a gift
where you get an immediate tax deduction, still control the investment of the assets and receive income from the investments for the rest of your life with anything left over going to charity at your death.

Make a transfer of assets
where you get an immediate tax deduction, still control the investment of the assets and receive income from the investments for the rest of your life with anything left over going to charity at your death.

Different groups rate their interest after receiving different descriptions

Does it make much difference?

75



76

Describing a CGA

Make a gift
and in exchange receive a guaranteed lifetime income from the charity.

Enter into a contract with a charity where you transfer your cash or property
and in exchange receive a guaranteed lifetime income from the charity.

Does it make much difference?

77



78

Formal terms lower charitable interest

2014 Survey, 1,417 Respondents, Group F/G

**Interested
Now**

36%

Get an immediate tax deduction and still receive income from your investments for the rest of your life by making a gift where you control the investment of the assets, but anything left over goes to charity at your death.

22%

Get an immediate tax deduction and still receive income from your investments for the rest of your life by making a gift

using a **“Charitable Remainder Trust”**

where you control the investment of the assets, but anything left over goes to charity at your death

**Will Never
Be
Interested**

14%

23%

79

Formal terms lower charitable interest

2014 Survey, 1,418 Respondents, Group F/G

**Interested
Now**

50%

Receive a tax deduction and make a gift that pays you income for life

23%

Receive a tax deduction and make a gift that pays you income for life

called a **“Charitable Gift Annuity”**

**Will Never
Be
Interested**

8%

19%

80

Formal terms lower charitable interest

2014 Survey, 1,422 Respondents, Group F/G

**Interested
Now**

26%

Immediately receive a tax deduction for 70% of the value of a house or land by making a charitable gift of the property, but keeping the right to use it for the rest of your life.

15%

Immediately receive a tax deduction for 70% of the value of a house or land by making a charitable gift of the property,

using a **“Remainder Interest Deed”**

but keeping the right to use it for the rest of your life

**Will Never
Be
Interested**

23%

30%

81

What is the best "front door" phrase to get people to read about planned giving information?

They have to be interested in finding out more



Suppose you are viewing the website of a charity representing a cause that is important in your life. In addition to a "Donate Now" button, the following buttons appear on the website. Please rate your level of interest in clicking on the button to read the corresponding information.

82

Survey #1: 2,550 respondents

I am definitely interested

- 3% Gift planning
- 4% Planned giving
- 7% Giving now & later
- 16% Other ways to give
- 20% Other ways to give smarter

83

What is the best "front door" phrase to get people to read about planned giving information?

Which of the following types of information would you expect when clicking on the button labeled "_____"

They have to expect to see planned giving information (i.e., not "bait and switch")



84

12 types of planned giving information

1. make a gift of stocks
2. make a gift of bonds
3. make a gift of real estate
4. make a gift in your will
5. make a gift in your living trust
6. make a gift by naming a charity as death beneficiary of your life insurance policy
7. make a gift by naming a charity as death beneficiary of your IRA or retirement account
8. make a gift by naming a charity as death beneficiary of your bank account
9. make a gift and, in return, receive lifetime income from the charity
10. avoid capital gains taxes by making charitable gifts
11. avoid estate taxes by making charitable gifts
12. avoid income taxes by making charitable gifts

Which of the following types of information would you expect when clicking on the button labeled "_____"? How to...

85

Combined Results		12 types of PG info average
I am definitely interested		I definitely expected this
3%	Gift planning	20%
4%	Planned giving	12%
7%	Giving now & later	7%
16%	Other ways to give	15%
20%	Other ways to give smarter	19%

86

Do we communicate with donor language or insider language?



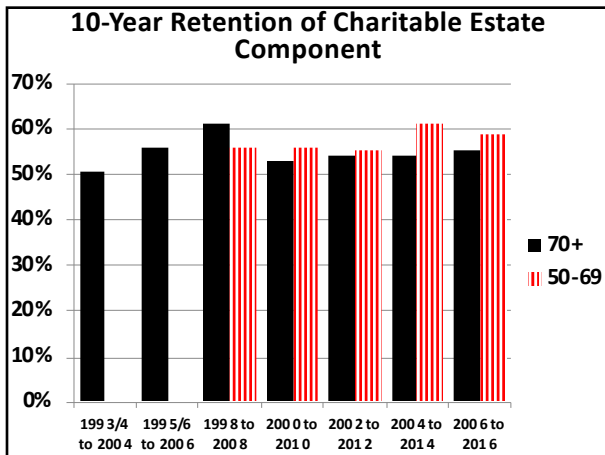
87

Don't count it and forget it

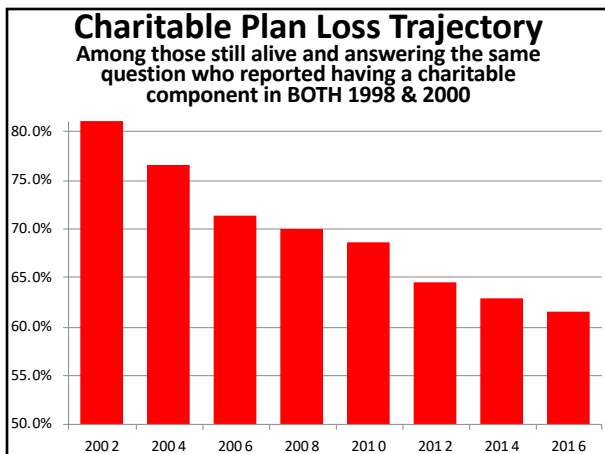
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8. Don't go radio silent at the critical moment
9. Target the 3 C's (childlessness, consistency, capacity)
10. Go beyond the will

88



89



90

Practice suggestions

What now?



91

**“Count it and forget it”
doesn’t work!**



92

**A bequest
commitment is the
beginning, not the
end**



Higher value
in converting
to irrevocable
commitments:
gift annuities,
charitable
remainder trusts,
remainder interests
is homes and farms.

93



Charitable plans signed earlier
DO
 produce larger gifts,
IF
 they stay in (or they return later)

94

Don't go radio silent at the critical moment

<ol style="list-style-type: none"> 1. If you want a larger audience, don't lead with death 2. Emphasize lasting social impact 3. Present a social norm default (<i>people like me do things like this</i>) 4. Advance the donor life story 5. Encourage tribute gifts in wills 	<ol style="list-style-type: none"> 6. Use family words not formal words 7. Don't count it and forget it 8. Don't go radio silent at the critical moment 9. Target the 3 C's (childlessness, consistency, capacity) 10. Go beyond the will
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95

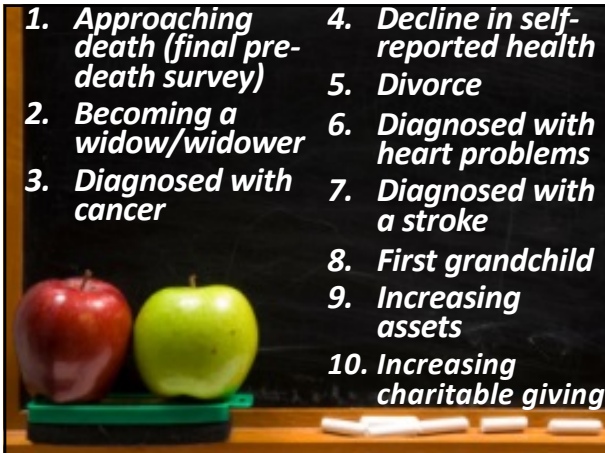
When do plans change?



96



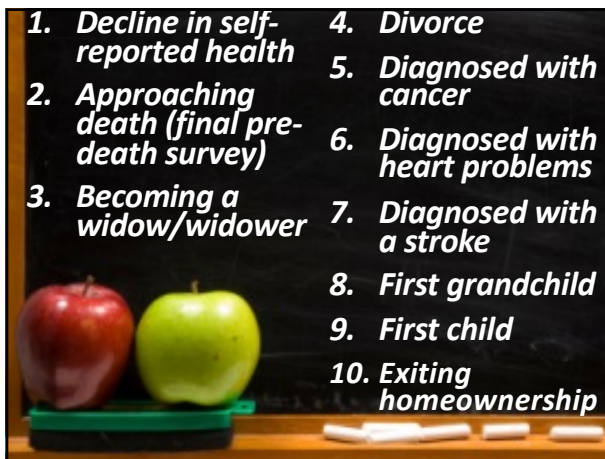
97



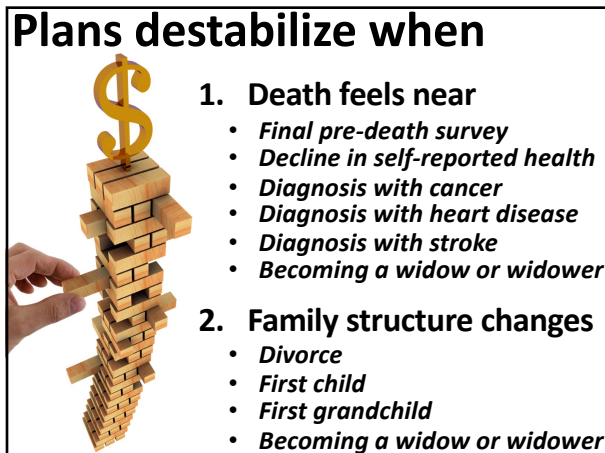
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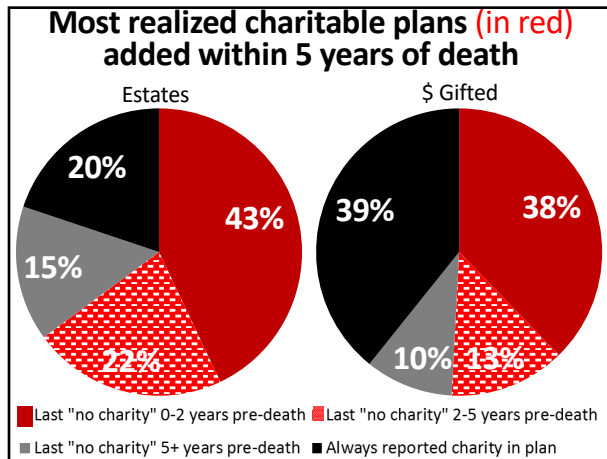
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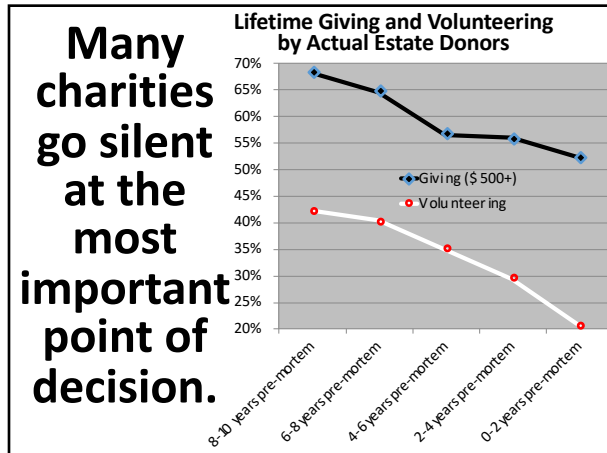
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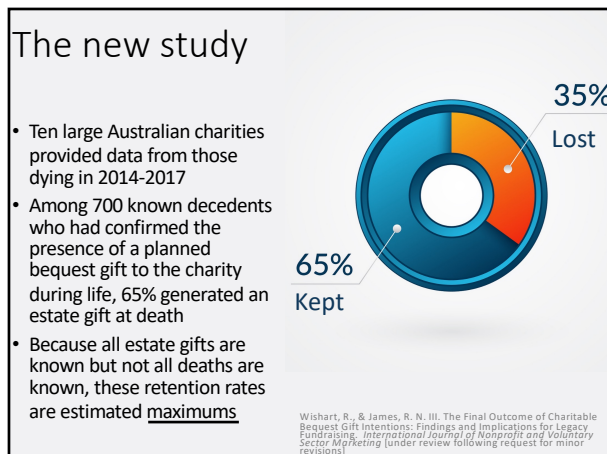
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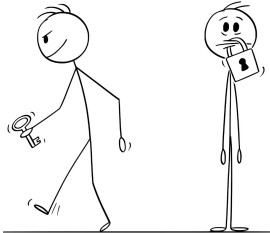
Some organizations did dramatically better than others

- The overall lost gift rate was 35%
- Different organizations' lost gift rates varied from 17% to 60%


106

Don't go "radio silent"

- The average loss rate was 24% when the charity had at least one communication with the decedent within two years of death, and 48% otherwise
- This gap is likely much larger, because deaths among those with no communications who generate no gifts are less likely to be known by the charity



107



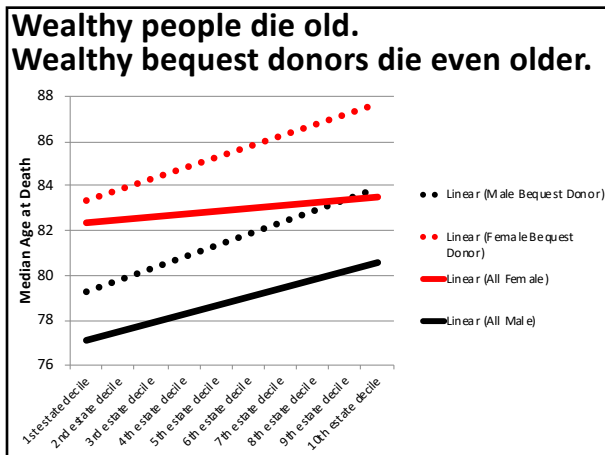
Legacy societies don't work unless you do

One in four who had confirmed the presence of a bequest gift to the charity did not receive a single communication of any type from the charity during their final two years of life

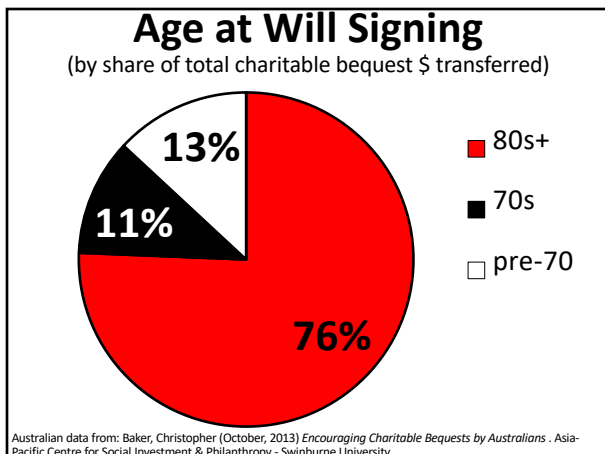
108



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111

Half of all charitable bequest dollars came from decedents this age and older...




Current U.S. study (1992-2014):
Age 86

New Australian study (5% sample of national probate files 2010):
Age 90

Remember that most realized charitable bequests are added within 5 years of death

112

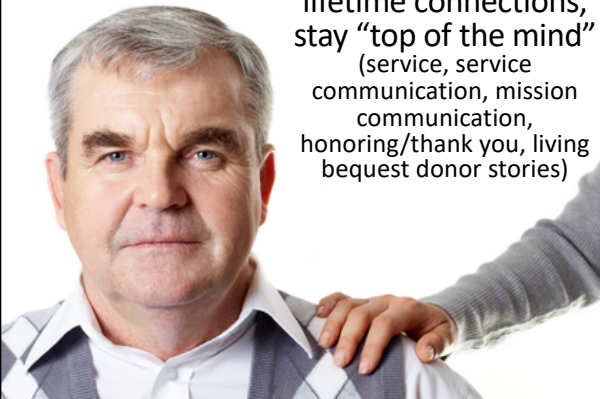
Plans destabilize as death approaches



- lifetime reports made as death approaches
- post-mortem transfers v. lifetime reports
- timing of the last changes made to the final will

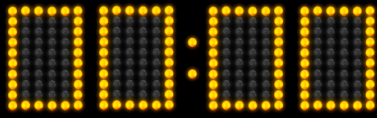
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For those 75+ with lifetime connections, stay "top of the mind" (service, service communication, mission communication, honoring/thank you, living bequest donor stories)



114

The score doesn't count until the clock runs out



- Plans become unstable as death approaches
- Stay connected! Stay communicating!

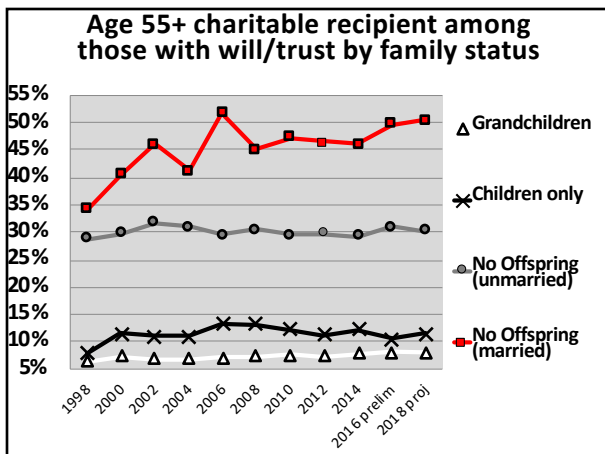
115

Target the 3 C's (childlessness, consistency, capacity)

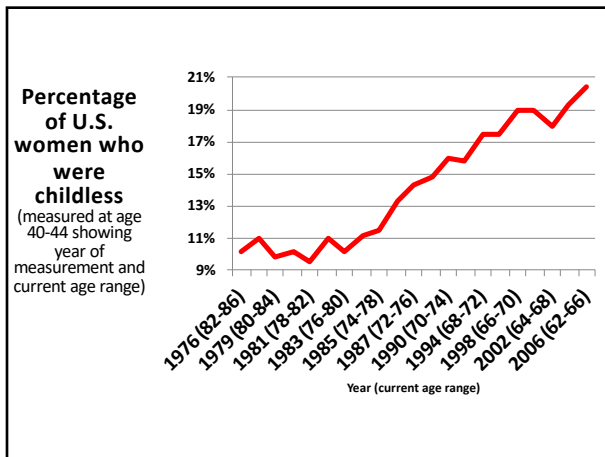
1. If you want a larger audience, don't lead with death
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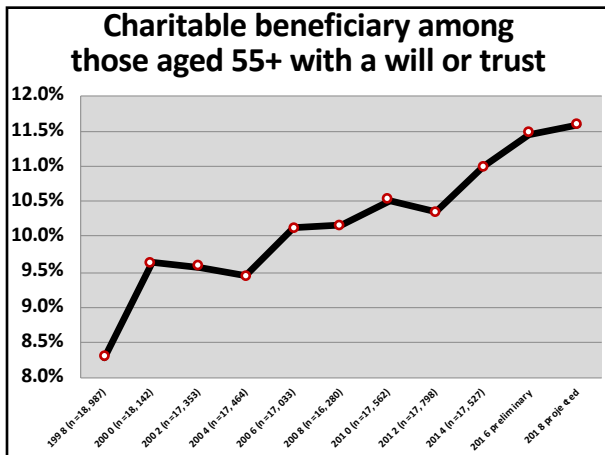
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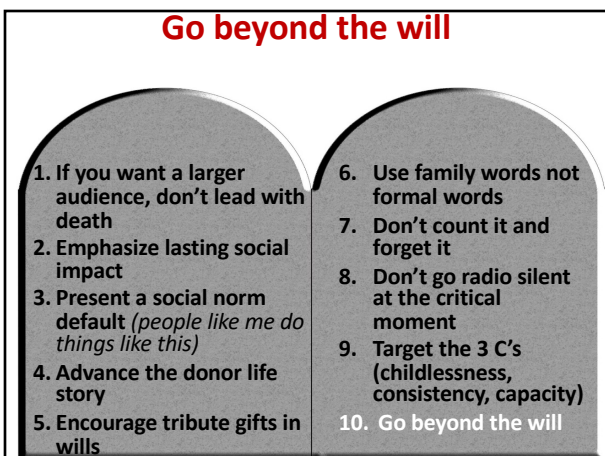
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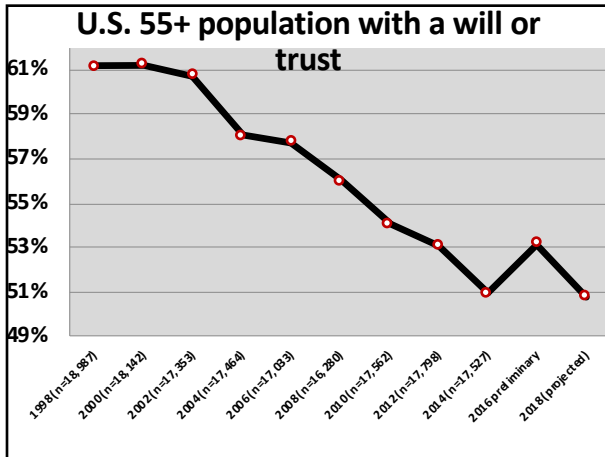
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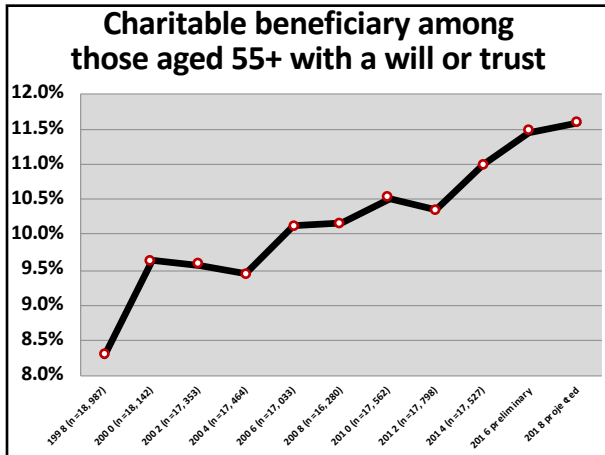
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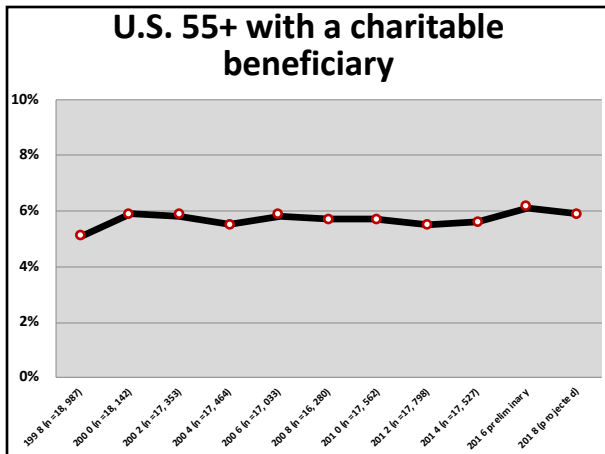
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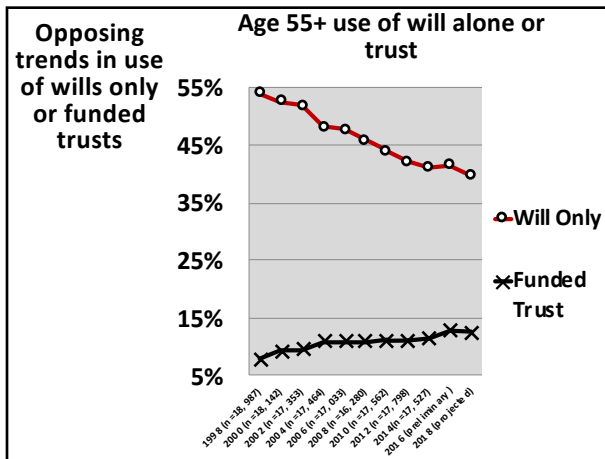
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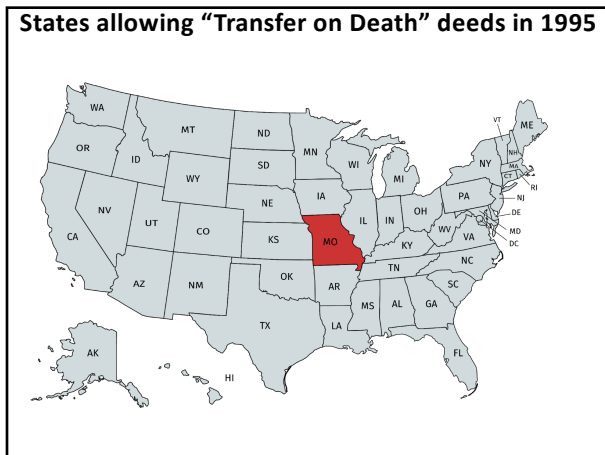
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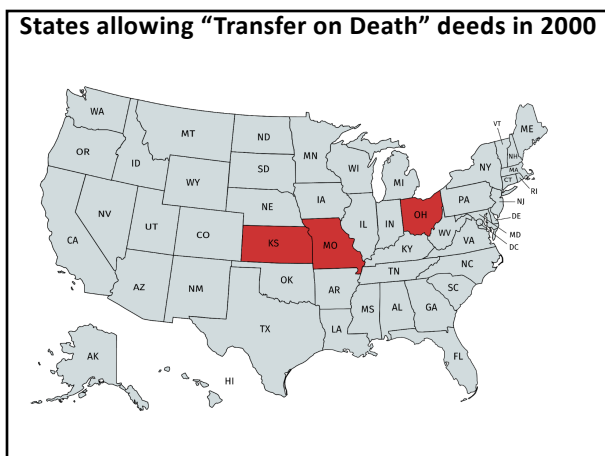
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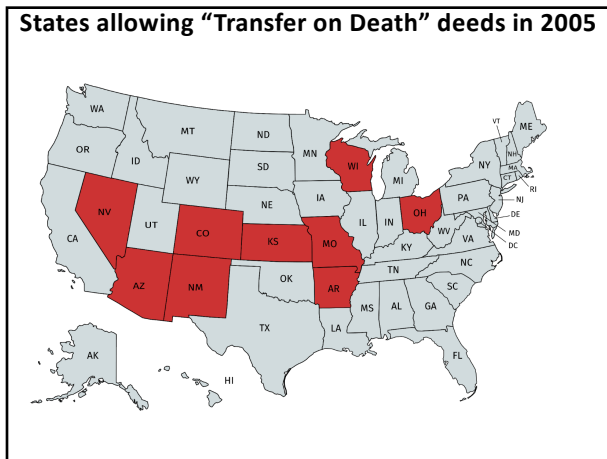
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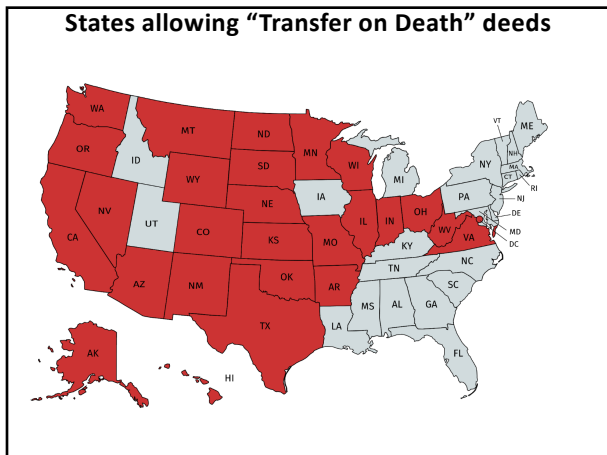
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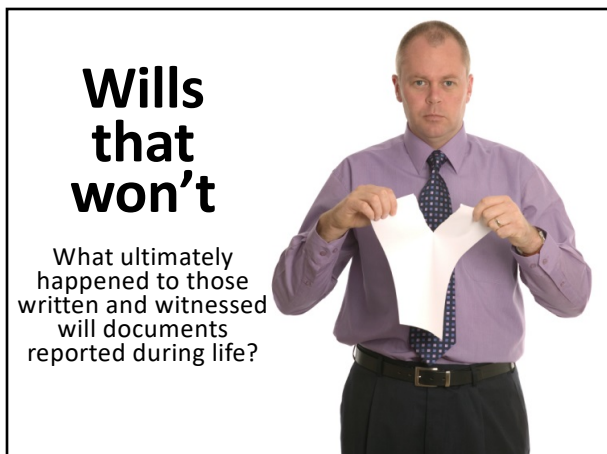
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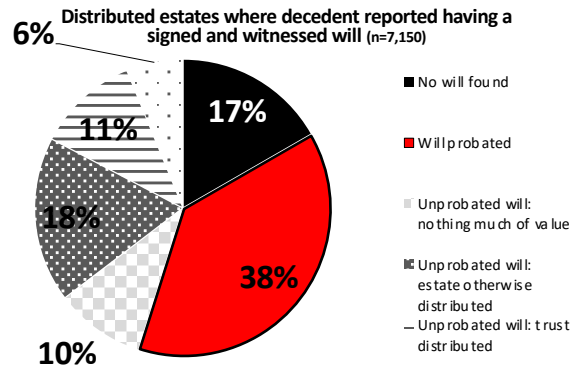


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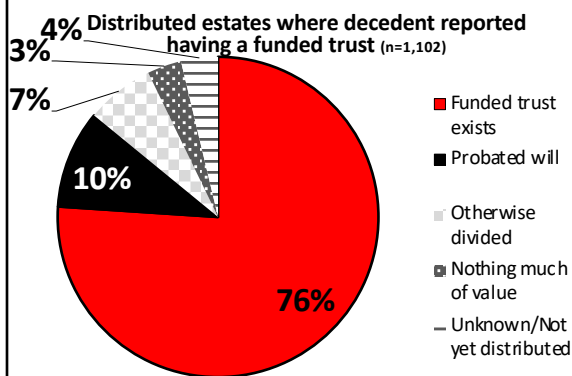
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Reported wills are often unused



133

Funded trusts more likely to work



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Top 10 legacy fundraising principles from scientific research: Theory, statistics, and results from the lab

- Professor Russell James, Texas Tech University. For free links to all my slides, videos, papers, books, connect on LinkedIn!
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EMERGING
STRONGER
TOGETHER

Evaluation: please click the link in the chat
to share your feedback of today's session.

Thank you!

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