

MAKE-A-WILL MONTH TOOLKIT

WHAT'S INSIDE?

- ▶ EMAIL TEMPLATES
- ▶ SOCIAL MEDIA SAMPLES
- ▶ SAMPLE MAIL PIECES
- ▶ SUGGESTED SCHEDULE



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What is National Make-A-Will Month?

Make-A-Will Month is an annual initiative that focuses on raising awareness about the importance of creating a will and planning for the future. While this campaign primarily emphasizes the benefits for individuals and families, it also presents valuable opportunities for nonprofits. Here's why Make a Will Month holds great importance for organizations like yours:

Legacy Giving. Make-A-Will Month serves as a reminder to individuals about the significance of leaving a lasting impact through charitable bequests.

Strengthening Donor Relationships. By engaging in discussions around wills and estate planning, nonprofits can foster deeper connections with their supporters.

Diversifying Funding Sources. Bequests, endowments, and other forms of planned gifts can provide a steady and predictable source of income, allowing you to further your mission and expand your impact.

Securing the Future: Nonprofits often face uncertainty due to changing funding landscapes, economic fluctuations, or unexpected events. By actively participating in Make a Will Month, you can encourage your donors and supporters to take proactive steps in planning for their futures. This, in turn, helps to ensure that your organization receives sustained support even during challenging time.

What's in the toolkit?

3. How to Participate in Make-A-Will Month
5. Suggested Schedule
6. Sample Article
7. Sample Receipt Insert and Postcard
11. Suggested Social Media Article and Instagram Quote
13. Email Templates

How Can Make-A-Will Month Help My Organization's Mission?

Planned giving is a crucial and expansive topic that holds immense importance for your organization. As revealed by Giving USA 2022, planned giving accounts for a significant 10% of all charitable gifts. What makes these gifts particularly impactful is their often substantial nature, with some exceeding a donor's lifetime giving amount. As a result, legacy gifts have the potential to make a profound difference in advancing your organization's mission.

Legacy gifts offer various possibilities to amplify your impact. They can serve as valuable rainy day funds, providing financial stability during challenging times. Additionally, they can act as catalysts to launch new programs or initiatives, or even enable the acquisition of cutting-edge technologies that can propel your work forward.

“The pandemic instilled in donors a sense of responsibility and sustainability. Endowments that were once an afterthought are now at the top of donors' priority lists. Donors recognize the fragility of the organizations and institutions they support; they want to ensure their favorite causes can weather the next pandemic or catastrophe.” Giving USA, 2021

The good news doesn't end there: we are currently experiencing the greatest wealth transfer in history. Over the next 20 years, an estimated \$68 trillion will be passed down to future generations. Make-A-Will Month provides a crucial opportunity to ensure your donors are prepared to make informed decisions about their legacy while supporting the causes they love most.

How Can Make-A-Will Month Help Steward My Donors?

When discussing legacy giving, it is crucial to approach the topic with sensitivity and respect, focusing on the donor's philanthropic goals and aspirations. By fostering a genuine and supportive environment, you can strengthen relationships with nonprofit donors and inspire them to make a lasting impact through their legacy. Discussing legacy giving can greatly strengthen your relationship with nonprofit donors in several ways:

- 1. Shared Values.** By engaging in conversations about legacy giving, you demonstrate your shared commitment to making a lasting impact. This common ground deepens the connection between your organization and the donor, fostering a sense of alignment and trust.
- 2. Meaningful Engagement.** Legacy giving provides an opportunity for personalized and meaningful engagement. By discussing a donor's philanthropic goals and their desire to leave a legacy, you show genuine interest in their aspirations and create a space for them to share their values and motivations.
- 3. Recognition and Appreciation.** Acknowledging a donor's intention to include your nonprofit in their estate plans allows you to express sincere gratitude for their long-term support, and can deepen their emotional connection to your organization. Legacy giving also provides opportunities for donor recognition, such as naming opportunities or membership in legacy societies.
- 4. Transparency.** Discussing legacy giving provides an opportunity to show integrity. By keeping donors informed about the impact of legacy gifts and how they contribute to your organization's mission, you demonstrate transparency and accountability. Regular updates can foster a sense of pride and satisfaction in the donor's decision to support your organization's long-term goals.
- 5. Continued Partnership.** Legacy giving opens the door to continued partnership beyond the donor's lifetime. By involving their family or loved ones in conversations about legacy giving, you can extend the relationship and engage future generations in your organization's mission. This creates a legacy of support and ensures the sustainability of your organization's work.

Suggested Make-A-Will Month Outreach Schedule

Week 0 (prior to August)

- Inform your staff and board of Make-A-Will month initiative
- Create segmented lists for phone calls, emails, and printed mail
- Schedule all online content and print/mail content

Week 1

- Send initial email to all donors
- Send printed newsletter, article, postcard, or receipt insert to all active donors

Week 2

- Share legacy stories on social media
- Conduct Legacy Giving 101 training for staff and board members
- Send automated and personal invites for webinar

Week 3

- Make personal phone calls to all major donors and existing legacy donors
- Conduct legacy giving webinar

Week 4

- Share stories of impact on social media
- Share legacy society information and send personal invites to all legacy prospects

Week 5

- Send follow up email to all who opened or clicked through on initial email
- Follow up with any return mail or voicemails



Consider the Power of Your Legacy

When Lynette Gillard appeared as a contestant on the game show "Deal or No Deal," she shared she was hoping to win at least enough money to fund her In Vitro Fertilization treatments. The following day she was notified that an anonymous source had called the TV station and donated \$20,000 to pay for the treatment.

After his death, it was revealed that singer George Michael was the person who had given her the money. He wanted his money to make a difference in the world.

Much of our lives are spent raising families, building careers, and preparing for retirement. We all want our lives to make a difference and to be remembered fondly. Are you building a legacy that aligns with what you value most? With thoughtful planning you can leave:

- **A legacy of provision.** Nearly 70 percent of Americans do not have an up-to-date will. That means the majority of people you know have yet to get their estates in order. But an up-to-date estate plan not only prepares for good use of your resources - it also establishes a plan to ensure that your loved ones are provided for and that any minor children will be raised by the guardian of your choosing. Your legacy can provide protection, provision, and peace.
- **A legacy of love.** Many people are incorporating the idea of an "ethical will" into their estate planning. An ethical will passes along the riches of the heart. Personal letters, special family stories, affirmations of love, and your own life stories make an ethical will a rich and enduring gift.
- **A legacy of generosity.** What causes and organizations have you felt connected to throughout your life? Would you consider leaving them a gift in your will? Planning a legacy gift to causes you support is a powerful way to communicate what matters to you and inspire loved ones to think about how they may practice generosity in their lives too.



**LEAVE A
LASTING
LEGACY**

A Legacy That Endures

Everyone wants to be remembered for the good they left behind. But does your legacy align with your values of generosity and caring for others? Nearly 70 percent of Americans do not have an up-to-date will, but you can choose to create one that includes a legacy of:

- **Provision.** Ensure your loved ones will be well cared for.
- **Love.** Communicate the core beliefs and joys of your heart.
- **Generosity.** Support and sustain the organizations that you love.

If you would like to know more about building an enduring legacy, reply with the enclosed envelope or contact us today.

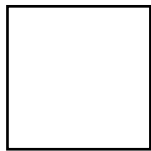




**"I don't want to end
up simply having
visited this world."**

-MARY OLIVER

Leave a lasting impact this
Make-A-Will month. Request
your Will Guide from our
website today!





Consider the Power of Your Legacy

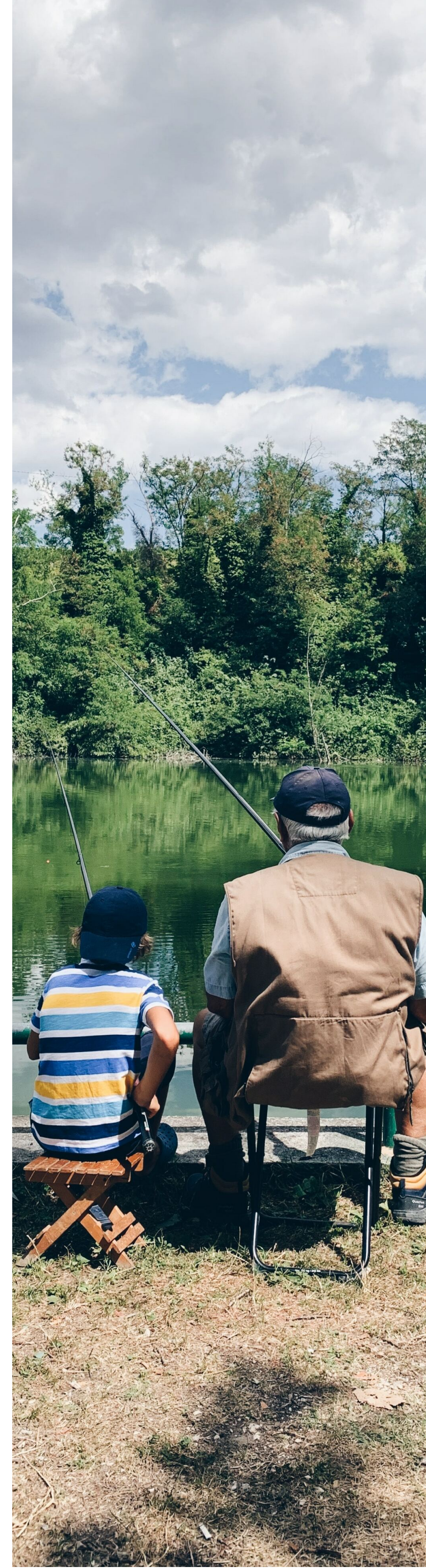
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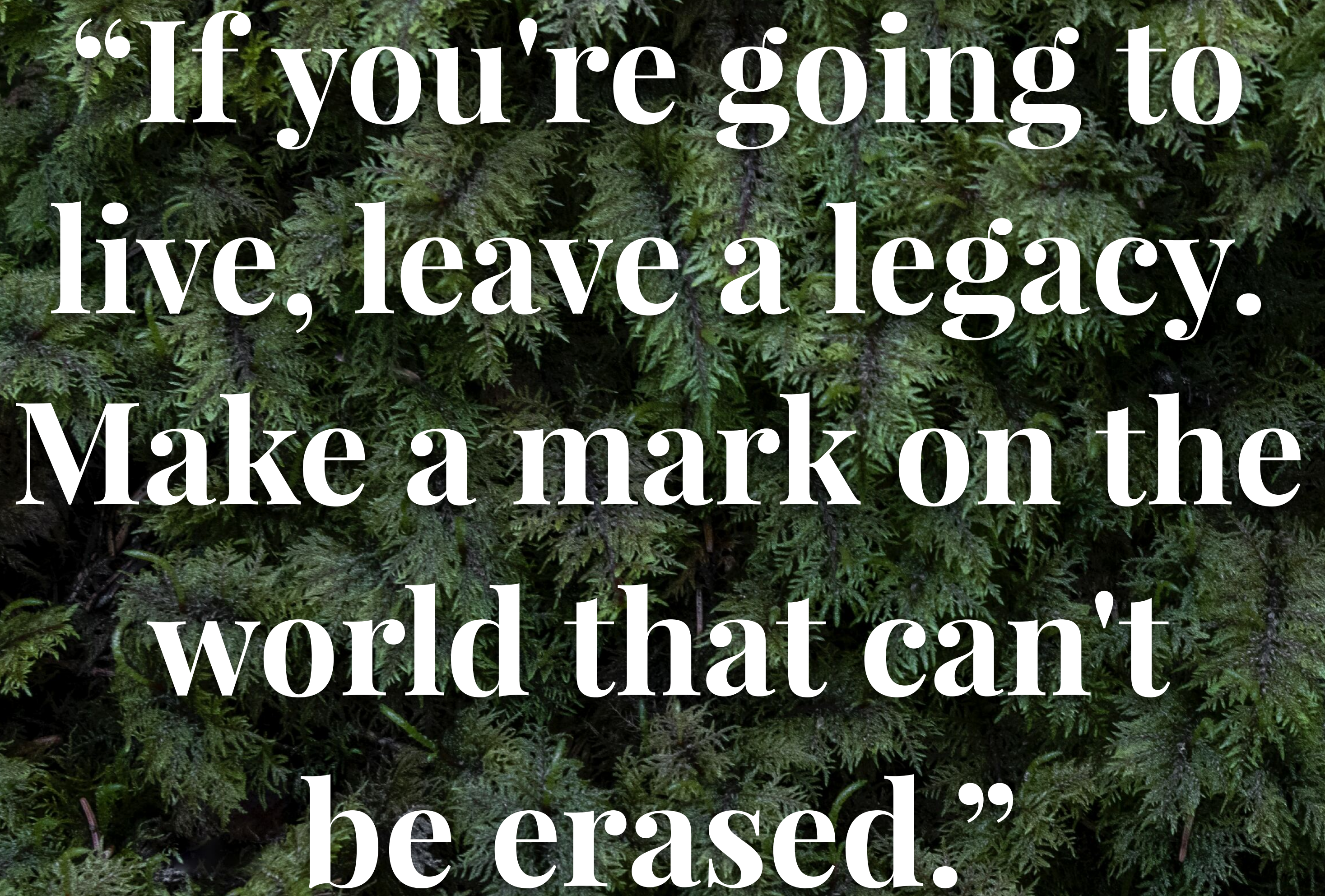
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Find out more about how you can build a powerful legacy. Contact our organization today to get started!





**“If you’re going to
live, leave a legacy.
Make a mark on the
world that can’t
be erased.”**

-Maya Angelou



It's National Make-A-Will Month!

We hope this email finds you in good health and high spirits as we kick off the month of August. This month is always an important time for families to spend time together as they savor the remaining weeks of summer.

Did you know it's also Make-A-Will month? National Make-A-Will Month is an important initiative that aims to empower individuals like you to secure their legacy and make a lasting impact.

During this time, people are encouraged to prioritize their estate planning by creating or updating their wills. This is an opportunity to ensure that your wishes are respected, protect your loved ones, and support causes that are close to your heart.

[Request a Free Will Guide](#)



A Legacy That Endures

Much of our lives are spent raising families, building careers, and preparing for retirement. We all want to make a difference in the world and be remembered fondly. Are you building a legacy that aligns with what you value you most?

[Read More](#)



Not-So-Buried Treasure

There's one form of treasure hunting no family should ever have to do - sifting through a loved one's estate without a will. While we can't plan for every unexpected life event, we can prepare by mapping out a secure future for those we love.

[Read More](#)

Join us August 23

This month's webinar will focus on best practices for family legacy planning. Local experts will join us to discuss best practices for preparing for life's unexpected events.

[Register Now!](#)

This Month Is All About Legacy!

If you're ready to learn more, we can help! Contact us for more information on...

- Will Planning Guide
- Ethical Will Guide
- Expert-Written Articles and Planning Worksheets
- Tax ID Numbers and Sample Bequest Language
- Blended Gift Resources
- Giving Other Assets (Real Estate, Stocks, Life Insurance)
- Impact Reports
- Legacy Societies

Subject: It's not too late to leave a lasting legacy!

Body:

Dear **Contact: First Name** ,

I hope this email finds you well. I wanted to send you a quick reminder about National Make-a-Will Month, which is drawing to a close. This is your chance to participate in this important initiative and ensure your legacy is secured.

Creating or updating your will is a critical step in safeguarding your wishes, protecting your loved ones, and leaving a lasting impact on the causes you hold dear. National Make-a-Will Month serves as a reminder to take proactive measures and prioritize your estate planning.

If you haven't already done so, we encourage you to consider the following actions:

- 1. Review your current will.** Take a few moments to review your existing will, ensuring that it accurately reflects your current wishes. Consider any life changes, new family additions, or charitable causes you may wish to support.
- 2. Seek expert advice.** Consult with an estate planning attorney or a legal professional who can guide you through the process of creating or updating your will. They can offer invaluable advice tailored to your specific circumstances and ensure that your document is legally binding.
- 3. Include charitable giving.** National Make-a-Will Month presents a unique opportunity to include charitable organizations, such as ours, in your estate plans. Your support can make a lasting impact on our mission and help us continue our vital work.

National Make-a-Will Month concludes at the end of August. Don't miss this chance to secure your legacy and provide for the future of your loved ones and the causes you cherish.

If you have any questions or need further assistance, please feel free to reach out. We are here to support you throughout this process and provide you with tools and resources.

Thank you for your dedication to our organization and your commitment to making a difference. Your support truly matters, and we are grateful for your generosity.

Best regards,

Sender: Signature

LOOKING FOR MORE?

Make-A-Will Month is a crucial part of a nonprofit's planned giving strategy, but it's not the whole story. If you're ready to make the most of your planned giving potential, reach out to us today. We can show you how to get more legacy gifts and create a pipeline of potential legacy donors with clear, actionable steps that actually work.

You've taken the first step, so let's dive in! Start today by booking a free consultation or requesting a free Planned Giving Growth Plan.



Get Started With Canopy

If you want an effective, measurable program for increasing planned giving that is proven, sustainable, and simple to implement and maintain, get Canopy today.

[Talk to Our Team](#)



Free Planned Giving Growth Plan

The Growth Plan outlines your estate gift potential, includes the four pillars of Canopy's program, and shares customized program options that meet your organization's specific goals.

[Get the Growth Plan](#)



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