



# OBJECTION!

Addressing Legacy Giving Concerns



Harvey   
McKinnon  
ASSOCIATES  
Building Donor Value



# Hello!

#LegacyObjection  
@LYNNEBOARDMAN  
@DavidKravinchuk

Philanthropy  
for everyone.  
*the  
common  
good*  
FUNDRAISING

 **AFPICON**  
2023 | NEW ORLEANS  
APRIL 16-18

afpicon.com  
#afpicon

Presenting Sponsor:  
**blackbaud**<sup>®</sup>



# Promise

You'll learn the 5 most common objections to making legacy gifts and how to build your very own set of powerful messages to dissipate donor doubts.



# Legacy Marketing



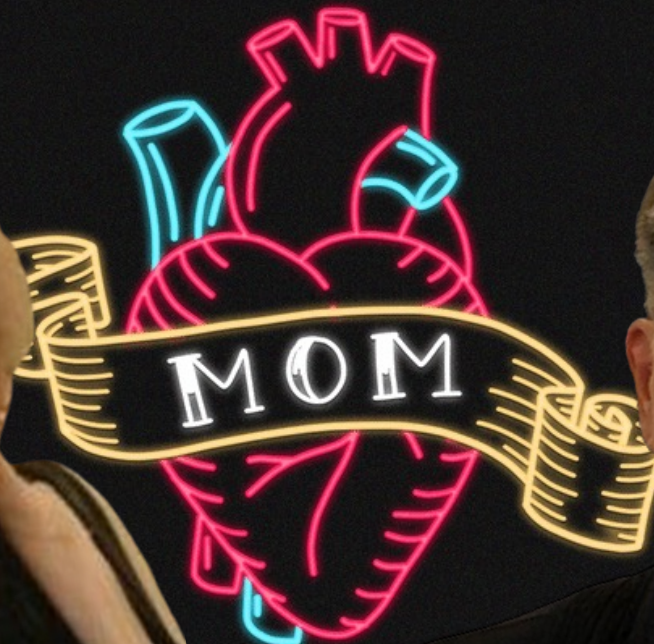
The Kids



The Cat



YOU





1,000,000,000,  
000



Retirement / Personal Finance

# Canadian inheritances could hit \$1 trillion over the next decade and both bequeathers and beneficiaries need to be ready

*Jason Heath: Here are some decisions and strategies to consider when it comes to the complexities of estate planning*

Jason Heath  
Apr 08, 2021 • April 8, 2021 • 5 minute read • [14 Comments](#)



## TRENDING

1 For GM cal

2 Dia fail sca

3 Put cas Alt

4 For





30,000,000,000,  
000



# IN A NUTSHELL



# The Holy \$#!& Slide

## Worrisome

Our best groups of donors (Matures & Boomers) will be passing on.

## Terrifying

If we don't secure bequests, you'll have a massive decrease in revenue, because they're the backbone of your annual program.

## Upsetting

And if you aren't asking effectively for legacies from them NOW, be sure that other charities are.

- BIB
- Mail Series
- Legacy Survey
- Newsletter
- Website
- Social Media
- Events

OBJECTIONS



I don't want to think about  
my demise right now.



## Objection 1:

I don't want to think about my demise right now.

Response:

Let's not talk about it, then!



*A note from the desk of  
Cornelia Taschow-Graupe*

*c/o 1500 Royal Street  
Regina, SK S4T 5A5*



<<July Date, 2018>>

Dear <<Salutation>>,

Just the other day, someone asked me why I chose to be a teacher.

“With a gift in your will, you can secure the values that are so dear to you and me both, for future generations. And you will also ensure more young people have access to a community that will support their development as they become citizens for the future.”

... friends and family often ask me, “What makes Luther so special to you?” My answer isn’t complicated – the students, the staff, and our entire Luther community is completely focused on supporting us...

You can see this in the fine traditions that have carried on here for over 100 years! It’s a rare thing these days. Trust me.

For years, I worked for the provincial education ministry. I also spent time teaching at many other good schools in Regina. But you can take it from me...none can compare to Luther. It’s such a special place! It’s all due to the whole-person – intellectual, physical, emotional and spiritual – approach to education that makes such a difference.

*...continues*





“

“Isn't it lovely to imagine what Canada might look like in the future if more of us took this step and made a bequest to CPAWS?...I hope that when you consider your future plans, you too will consider the future of conservation in this country.”



Go the extra mile by raising funds to right the poverty. Whether you're



**ROWENA'S**

"I want to leave a legacy not just for my daughter, but for other people.

I like the work that Oxfam does to support children."

AROUND THE WORLD, OXFAM MOBILIZES THE POWER OF PEOPLE AGAINST POVERTY

OXFAM HEADQUARTERS LOCATIONS COUNTRIES WHERE WE WORK

Without support, we would be waiting for the rain, but with this support we can get water anytime we want. We have a lot of crops."

gifts help pastoralists like Hassana to diversify their livelihoods so their families consistently have enough food and

For more information on leaving a gift in your own Will, please contact Rowena at rowena.griffith@oxfam.



My kids  
will hate me.



# Objection 2:

My kids will hate me.

Response:

- “They will be so proud!”
- “Of course, we all want to take care of our families first.”



26

August 18, 2008

John CCS08018 Sample  
1234 Any Street  
Anytown, BC V1A 2B3



*From the desk of Barbara Gillanders*

“My mom died 7 years ago. But before she died she did a wonderful thing.”

In fact the older I get, the more I appreciate what my mom did, and how she made a difference in my life and the lives of others.

I'm writing you today to tell you about one thing my mom did that is a gift to you and everyone in our community.

I also hope her action inspires you.

My mom's name is Norma West. She died 7 years ago. But before she died she did a wonderful thing.



### A Special Bond

“All of Walter’s children were happy to learn that their dad would continue to be a part of Luther's future. Greg and his siblings were also proud to know that the values and ideals Walter cherished would live on for the next generation of Luther College students.

important Luther

Posehn family also understood how important Luther was to

“Following his father’s example, Greg has arranged a special gift in his will. It’s another testament to the special bond father and son share with Luther College.”



It sounds complicated.



Objection 3:  
It sounds complicated.

Response:  
It's easy!





“

Adding the Lions Foundation of Canada Dog Guides to my Will was very simple to do. You need to know the official name of the organization and their charitable registration number, and your lawyer, notary or family advisor can do the rest.”

-Joanna



David Kravinchuk  
 672 Milverton Blvd  
 Toronto ON M4C 1X9

Dear Friend,

I was terrified.



Being rushed to Centenary emergency that night after having a heart attack was one of the scariest experiences of my life. Even with my wife, Lorraine, at my side, calmly explaining everything that was going on, using her years of

Once we decided to leave a bequest in our will for Rouge Valley, making the arrangements was pretty straightforward. We simply spoke to our lawyer about it when we updated our will, so it didn't take any extra time or money.





“

So when I recently attended a seminar about wills and learned how easy it is to leave a bequest to a charity without depriving my family, I decided I would remember Red Cross in this special way.



## WHAT TO DO NEXT

- ➔ Consider how you would like to be remembered through your legacy. What is important to you in your life and how will your estate planning reflect your interests and values?
- ➔ Contact your **financial advisor** or **lawyer** to start preparing your Will, or to add a simple amendment to your existing Will. Professional advice will also help you maximize the **tax advantages** of your gift.
- ➔ Ensure that you provide your professional advisor with the **crucial information to the right**.
- ➔ If you feel comfortable sharing your news, let Seva Canada Society know that you have included a gift in your Will by emailing [fundraising@seva.ca](mailto:fundraising@seva.ca)
- ➔ Questions? Feel free to call **1-877-460-6622** or email [fundraising@seva.ca](mailto:fundraising@seva.ca) for assistance.



PHOTO CREDITS: COVER: © JON KAPLAN  
 PAGE 1: © JON KAPLAN  
 PAGE 3: © SEVA  
 PAGE 5: © DEANNE BERMAN  
 BACK COVER: © PAOLO PATRUÑO [WWW.PAOLOPATRUÑO.ORG](http://WWW.PAOLOPATRUÑO.ORG)



## FOR YOUR ESTATE PLANNER OR FINANCIAL ADVISOR

To include a bequest to Seva Canada Society, you will need to provide the legal professional drafting your Will our legal name and address. It is essential that you use our correct name and address, which is:


**Seva Canada Society**  
 Suite 100 – 2000 West 12<sup>th</sup> Avenue  
 Vancouver, BC V6J 2G2  
 Registered charity #:  
 13072 4941 RR0001

### Three sample clauses

"I give to Seva Canada Society, 100 – 2000 West 12<sup>th</sup> Avenue, Vancouver, BC V6J 2G2 \_\_\_ percent of the residue of my Estate for its charitable purposes."

"I give to Seva Canada Society, 100 – 2000 West 12<sup>th</sup> Avenue, Vancouver, BC V6J 2G2 the residue of my Estate for its charitable purposes."

"I give to Seva Canada Society, 100 – 2000 West 12<sup>th</sup> Avenue, Vancouver, BC V6J 2G2 the sum of \$\_\_\_\_\_ (or a description of the property or asset) for its charitable purposes."



Legacies are for  
the rich and famous.  
I'm neither.



## Objection 4:

Legacies are for the rich and famous.  
I'm neither.

Response:

Share stories from ordinary  
people.

**“Cancer has hit my family many times. That’s why I want to make a long-term commitment to fighting it.”**



Marlies Michael with her late husband, Jim.

Marlies Michael has felt the pain of cancer. Cancer stole away both her mother and mother-in-law.


Then, on Christmas day, 1993, Marlies’ beloved husband, Jim, passed away from colon cancer. This tragic event inspired her to include a bequest gift to the Canadian Cancer Society in her will.

But sadly there was more cancer in her future.

“I thought I’d be the last person ever to get sick from cancer. I exercised regularly and ate sensibly all my life.”

Her own diagnosis with gallbladder and liver cancer led Marlies to update her will once more to include an even larger gift to the Canadian Cancer Society.

“I’m lucky to have received excellent medical care. You read a lot of good things being done in BC – in particular in terms of research. That is why I chose to support the Canadian Cancer Society in my will,” says Marlies. “What better way to help families?” 🌸



## Joseph Laskowski: a gift of thanks and devotion



I first found out about the Oratory where I'd go to Mass at lunch hour, in the years before I retired. In the back they had a little altar and a poster of Brother André. One day, I saw pamphlets about the 'miracle man of Montreal' and I thought I should plan on a visit one day.

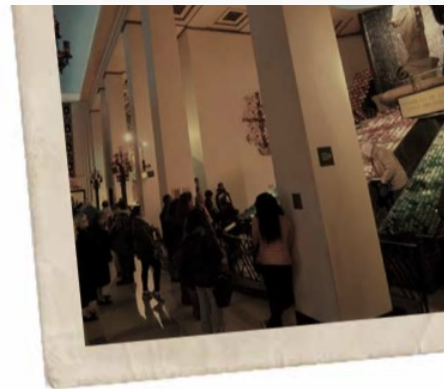
Then in early 1990, I bought a little fixer upper in the town I live in, Swoyersville, Pennsylvania. While I was working on adding a garage, I pulled something bad in my groin and could not walk far or lift heavy objects.

“I’m a pretty average person, having worked in the City’s Maps Department for many, many years. I do what I can to help the charities and institutions I care about most. It’s something I feel great about.”

because it was the healing I've experienced in my life.

Eventually, I decided to make a gift in my will for Saint Joseph's Oratory as a way to thank Saint Brother André for my healing. I'm a pretty average person, having worked in the City's Maps Department for many, many years, I do what I can to help the charities and institutions I care about most. It's something I feel great about. I like the idea that when I leave this world, I leave something to the church since been a Catholic all my life. God has rewarded me, and he probably will until the day I die.

It was an easy decision. I feel good about it. And I hope you will take a moment to close your eyes and quietly think about joining me in making sure this very special shrine will be there for generations to come.







“

Making a bequest isn't about being rich. My mom remembered a total of 10 charities in her will, including the Canadian Red Cross, and she and my dad definitely never had a lot of money.



“

...whatever the size or scope of your estate, you will be making a real difference to the Indigenous students of tomorrow.

Some people may think that this type of giving is only for people with very large estates. Nothing could be farther from the truth. Any gift in a Will is extremely impactful. Your legacy gift will help Indigenous students continue to receive the support they need for years to come.



“

I know some people feel it's only the wealthy who get to leave gifts in their will to their local hospital. They are usually surprised to learn that most bequests come from hard working people who lead modest lives, who simply want to help their communities.”



You are just going to  
fritter away my gift.



Objection 5:  
You are just going to fritter away my gift.

Response:  
You can TRUST us

## Our Story

Vancouver Island's Mill Bay is selected as the site for a children's hospital.

A contribution from the Royal Family inspires the name Queen Alexandra Solarium for Crippled Children.



A splint and brace shop opens at the Solarium.



The G. R. Pearkes Centre for Children opens, treating patients with cerebral palsy.

1950

1989 -  
Stephanie McFee



The Rehabilitation Engineering Centre, later renamed the Fisher Building, opens, housing wheelchair, orthotic and prosthetic services.

Zoe at the mental health hub - 2017



Queen Alexandra Foundation opens, housing Child, Youth & Family Centres in Colwood and Sooke.

Fundraising begins to develop a youth mental health hub offering access to services and support under one roof.

1922

Edith Scott appeals to the Women's Institutes of British Columbia to help her sick step-daughter access treatment.

The Women's Institutes begin fundraising to build a children's hospital on the Island.

1925

The Solarium welcomes its first patient.



1927

To meet patient needs, the Solarium relocates to its current location in Victoria.



1960

The Queen Alexandra Solarium is renamed the Queen Alexandra Hospital for Children.

1968

The Anscorb House opens, treating patients with muscular dystrophy.

1982

The Queen Alexandra Foundation for Children is established, now known as the Children's Health Foundation of Vancouver Island.



Children in the playground

1984

1986

Vancouver Island's only child and youth mental health facility, Ledger House, opens.

1987

2004

Jeneece Place opens, a home away from home for families traveling to Victoria for their child's medical care.

2013 - Jeneece with Karis Taylor



2012

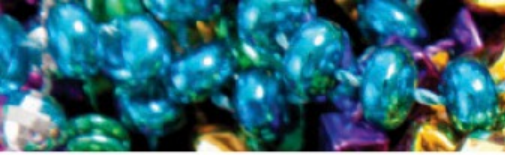
2017

1927 - kids at the Solarium



“

As a former volunteer on the board of the Foundation, I am confident in our decision because I know that our bequest will be well spent.



## A strong future for your legacy

A message from our Director



“We have healthy finances thanks to a combination of careful management and common sense. Whenever we plan projects, we always ask ‘is this a responsible way to spend the money our donors have given us?’ Our board of directors provides volunteer oversight. And our finances are audited each year by an independent accounting firm to ensure our transparency.”

“As the Director of Finance and Operations, I’m really proud of this. As a lifelong activist (yes, I was right there in the 60s!), I want every single penny possible to go toward making positive social change in our communities.”

As a Director of Finance and Operations, I’m really proud of this. As a lifelong activist (yes, I was right there in the 60s!), I want every single penny possible to go toward making positive social change in our communities.

China Brotsky





1. I don't want to think about my demise right now.

2. My kids will hate me!

3. It sounds complicated.

4. Legacies are for rich people. That's not me.

5. You are just going to fritter away my gift.

What will Rick Astley Never do?

A. Give you up

B. Let you down

C. Run Around

D. Desert you

E. Make you cry

F. Say Goodbye

G. Tell A Lie

H. Hurt you

I. All of the above

Questions?

# T. HANKS



@LYNNEBOARDMAN



Linkedin.com/

lynne@harveymckinnon.com

1-800-815-8565 (North America)



@DavidKravinchuk



Linkedin.com/DavidKravinchuk

david@cgfundraising.com

1-800-991-3318 x101 (North America)

0800 995 054 (New Zealand freephone)

