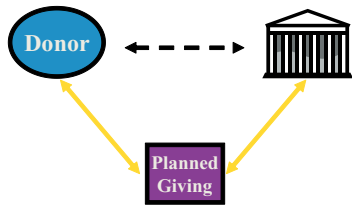


Slide 1

Asking for Gifts

Roger Ellison, CFP
2011 Western Regional Planned Giving
Conference
Costa Mesa, California
Friday, June 3, 2011

Slide 2



Slide 3

Systematic application of passion

Slide 4	<p style="text-align: center;">Systematic search for passion</p>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
Slide 5	<p style="text-align: center;">I am the Rehab</p>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
Slide 6	<p style="text-align: center;">Absolute integrity</p> <ul style="list-style-type: none">• Model Standards/Ethical principles• The Garrett Standards<ul style="list-style-type: none">– Never do to a donor what you would not do for your own mother and father.– No gift is worth the good name of your charity.	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

<p>Slide 7</p>	<p style="text-align: center;">Asking for Gifts the entire process in a nutshell</p> <ul style="list-style-type: none"> • Plan your meeting • Open the meeting • Probe donor needs • Nurture concerns • Discuss benefits • Gain commitment • Honor the relationship 	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
<p>Slide 8</p>	<p style="text-align: center;">Behavioral Styles</p> <ul style="list-style-type: none"> • Discern • Understand • Adapt 	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
<p>Slide 9</p>	<p style="text-align: center;">Emotion = \$</p> <ul style="list-style-type: none"> • Emotional needs • Financial issues • Decision-making process 	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

Slide 10	<p style="text-align: center;">Plan Your Meeting</p> <ul style="list-style-type: none"> • Research • Conceptual plan • Purpose • Objective • Preparation 	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
Slide 11	<p style="text-align: center;">Open the Meeting</p> <ul style="list-style-type: none"> • Begin with the end in mind – Covey • Build rapport • Share the purpose <ul style="list-style-type: none"> – NOT the objective • Seek permission to question 	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
Slide 12	<p style="text-align: center;">Probe Donor Needs</p> <ul style="list-style-type: none"> • Ask questions • Nurture their emotions • Offer solutions • Resolve issues • Reach agreement 	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

Slide 13	<p style="text-align: center;">Nurture Concerns</p> <ul style="list-style-type: none"> • I can't do any more... • Everything is going to my... • Are these things safe? • My uncle's... • I'm not doing any more than... 	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
Slide 14	<p style="text-align: center;">Present Benefits</p> <ul style="list-style-type: none"> • Convince mode • When? • Transition • Beware of yourself • Benefit Statement Planning 	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
Slide 15	<p style="text-align: center;">Present Benefits</p> <ul style="list-style-type: none"> • Match your benefit statement to the donor's behavioral style • Personalize the opportunity • Tie their passion to the gift • Never present on paper what you can present in person! 	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

Slide 16	<p style="text-align: center;">Gain Commitment</p> <ul style="list-style-type: none">• Bit by bit• Feel the pulse• Circle back• No manipulation or pressure	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
Slide 17	<p style="text-align: center;">Gain Commitment</p> <ul style="list-style-type: none">• Get agreement part by part• Take the pulse often• Stop and go back as necessary• Apply no pressure	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
Slide 18	<p style="text-align: center;">Gain Commitment</p> <ul style="list-style-type: none">• Sometimes there is no need for an ask• Summarize• Simple ask• Be patient• Nurture concerns• Details	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

Slide 19

Honor the relationship

- **Thank early!**
- **Thank often!**
- **Thank differently!**
- **Find ways!**

Slide 20

**Donors are
your friends.**

Slide 21



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