



an initiative of  
COMMUNITY  
FOUNDATION  
of ABILENE

# Sample Leave 5 Event Overview

## PREPARATION

The following is a guide to successful planned giving conversations with your current and prospective donor base. Below you will find helpful tools to guide you through a sample low burden, high results event. Remember, this template is scalable depending on your nonprofit's budget and organizational goals.

## EVENT SCOPE

**Target Audience :** Invite 8-10 of the following : board members, top or most loyal financial supporters, loyal and passionate volunteers, etc.

**Messaging:** Your event messaging should be simple and clarify that the intent of the event is to be educational about long-term sustainability for your organization.

**Location:** Consider hosting the event at your nonprofit, a board member's home, donor's home or small venue that works for the size of group you plan to host.

**Objectives:** Everyone should leave your event having learned about:

- your organization's mission and how their estate gift can continue to support it
- any recent accomplishments/future plans
- what the Leave 5 program is

## MEASURE OF SUCCESS

### Was your event NICE?

No pressure - was it clear that the event was not intended to be a fundraiser?

Inspiring - did guests walk away from your event feeling motivated to support?

Comfortable - was the atmosphere relaxed and low pressure?

Enjoyable - did guests walk away relishing their experience?

## SAMPLE EVENT BUDGET

*Optimal guest count: 10*

<b>Food</b>	Fruit and cheese party tray + variety pack of crackers	\$35.00
<b>Water</b>	Case of 35 waters	\$8.00
<b>Wine</b>	2-3 bottles - approximately 1 bottle of wine serves 2 people	\$60.00
<b>Beer</b>	12-24 cans - approximately 2-3 cans of beer per guest	\$30.00
<b>Disposables</b>	72 disposable pack of plates, cups, napkins and silverware	\$40.00
<b>Total</b>	<i>Please note all amounts are customizable based on budget.</i>	<b>\$173.00</b>



## Sample Planned Giving Script

Hi (NAME),

Thanks so much for taking the time to visit with me today. As someone who has supported our organization for a number of years I hoped to accomplish a few things from our visit today.

**First**, “Thank You” for your continued support! It is donors such as yourself that enable us to do the important work we do. Without your financial support (and volunteer hours if appropriate) combined with many others that share your same passion and confidence in our organization there is NO way we would be able to carry out our mission.

**Second**, I wanted to share some exciting news with you regarding the “x” program. I know you’ve supported this work in the past and I thought you would appreciate hearing the update.

**Third**, I’d really like to better understand why you have been such a loyal donor of ours.

**Fourth**, (this is the first appeal) you told me you really enjoy our “x” program. I can tell you that the need is far greater than our current capabilities. We would really like to expand (or sustain) that program if possible. In order to provide that “x” it requires “x” amount of dollars. Is this something that you still feel strongly about? If so, would you like to concentrate your giving on this endeavor? If so, how many “x” would you like to serve this year from your generosity?

**Lastly**, many of our loyal donors such as yourself are interested to learn how easy it is to leave a sustainable impact gift through their will or trust. Most everyone I visit with feels an obligation to ensure their family and friends receive an inheritance. At the same time, many understand the valuable work we do will be in demand for generations to come and get excited to know they can help. Unfortunately most people don’t realize how easy it is to leave a gift or even more shocking is they have no idea of the impact they can have on society.

Did you know you could designate a small percentage of your estate, perhaps even just 5%, to provide substantial, permanent funding for causes you care about? “x” dollars in your estate documents or beneficiary forms would provide “x” per year to our nonprofit if we put that gift into our endowment. And with the way tax laws are today, your heirs might not miss out on any of their inheritance.

Wouldn’t that be neat for both your family and charity to share in your generosity while showing future generations what their peers did for their community.

Sincerely,  
YOUR NAME

