

- **How** do you want to fund your goals?
- **Who** do you want to include in the decision, process, and giving?

Their answers will reveal the next question. Remember - keep asking “**and then?**”, “**tell me more**”, “**what if?**”. It’s essential you are open to really hearing their dreams and helping them fulfill those dreams. Do NOT shut them down. Laying out consequences and alternatives is your duty. Judging their dreams and steering them away from possibilities is not.

By thinking creatively, exploring options, and including others (other advisors, family members), you should be able to offer solutions that are expansive rather than restrictive. You want the client to say, “Really, I can do that? I can make that happen? I had no idea.” **You want your client to be the hero, to be a philanthropist.**

~Slide 21 - Death on a Motorcycle~

Sidebar here: It’s natural for humans, when confronted with estate planning immediately see the topic being their **death** – planning for their death. At the most essential level, approaching the donor as the Hero and you as the Guide on this journey to discover their why and live their passion and pass on their values, helps them **reframe** the conversation from planning their death to **planning for their legacy to live on and their family to flourish.**

~Slide 22 - Tributes~

A couple of practical tools here. Talking specifically about charitable gifts in plan can be approached by talking about autobiographical connection. In layman’s terms, these are **tribute** gifts. Remembering or honoring a loved one is an incredibly effective way to move a client to act now on their charitable intent.

As Dr. **Russell James**, renowned professor and researcher of planned giving at Texas Tech, reminds us, **philanthropy** is a **social act** using the mechanisms of **family bonding**. This is why using stories and simple language is most effective. People want to identify with being someone who helps others.

~Slide 23 - Peer Pressure~

The other approach, which has been studied for its effectiveness by Dr. Russell James (*Inside the Mind of the Bequest Donor: a Visual Presentation of the Neuroscience and Psychology of Effective Planned Giving Communication*, 2013), is **social Influence**.

So if you did nothing else than use social influence language to ask about charitable intent, you’d increase gifts by 10%. “Many people like to leave a gift to charity in their will. Are there any causes you would support in this way?” (15.4%) vs. “Would you like to leave any money to charity in your will?” (10.4%) vs. No reference to charity (5.0%)

~Slide 24 - Tool Box~