

# QUESTIONS FOR DONORS

**LISTEN** As you talk with your donors and develop relationships with them, listen for some of these concerns:

**Indicates a willingness to give from present income:**

“I would like (need) more income in retirement...”  
“I have some CD’s coming due/bonds maturing...”  
“My stocks are not paying dividends (or are paying low dividends)...”  
“I am afraid of (or don’t like the stock market)...”  
“The recent tax law changes are negatively impacting my income, my retirement, and/or my charitable giving...”

**May present the opportunity for a commitment from one’s will, or a retirement plan designation:**

“My children are all doing very well...”  
“I do not have children...”  
“I wish I could give more, but I am concerned about outliving my resources...”  
“I have estate tax issues” or “my parents paid estate taxes and I want to make sure I don’t...”  
“I am leaving my estate planning to my children” or, “I haven’t looked at my beneficiary designation in years...”

**May offer the opportunity for a substantial outright gift:**

“I am having a great year in my business...”  
Real Estate options for giving:  
“I have too much property...I want to simplify...”

*continued...*

“I do not use that vacation home or land any more...”  
“I am tired of having to deal with (or maintain that property” or, “I am getting too old to use that home or property...”  
“The property taxes are killing me...”  
“I would like to do more for (your organization), but I am not sure how...” or, I would like to do more, but my cash (income) is limited...”  
“We are moving away...” or, we are moving into a retirement community...”  
“Our kids have no interest in the property” or, they live so far away...”  
“I want to live here (in house or on property) forever...”  
“I do not want to deal with the hassle of selling it...”  
“I’d like some income from the sale, but also want to make a gift...”

**Stock options/IRA’s can be sources for charitable giving:**

“I have to start taking money from my retirement plans...”  
“I’ve owned the stocks/assets for a long time”... or, I hate the capital gains tax...”  
“I am concerned about estate taxes’ or, “I know I have estate tax issues...”

**Life changes can offer opportunities for philanthropy:**

“I am going to retire soon...”  
“I am thinking about selling my business...”

## ASK

When you talk with your donors, you may want to ask these questions:

- Do you want to consider including a gift to our organization as part of your estate plan?”
- If there is a way to make a gift to charity largely out of federal estate tax dollars, would you be interested in exploring options that accomplish that goal?
- Value assessment and goal setting often influences charitable giving:
- What role has philanthropy played in your family? What role should philanthropy play? What value would it bring to your children and grandchildren?
- What core values do you want to express in your giving? What do you want to stand for?
- When you think about the challenges facing your community, what are your major concerns?
- Are any of these concerns or should any of these concerns be the focus of your giving?
- What would you like to accomplish with your giving? What do you think is possible?
- Are you struggling to keep up with the responsibilities of your private or family foundation?

### WHEN YOU NEED HELP

If you are uncomfortable asking these types of questions, keep in mind that these are the questions we as charitable planning professionals ask of donors everyday.

We appreciate that your role is to develop the relationship, so if you sense that a donor may qualify for a non-cash gift, simply mention your organization’s partnership with Stewardship Foundation and ask if they might be willing to receive a phone call from us.

