

# Making the Most of your Legacy Society

Stelter

April 19, 2023

**Margaret M. Holman**

**Holman Consulting**

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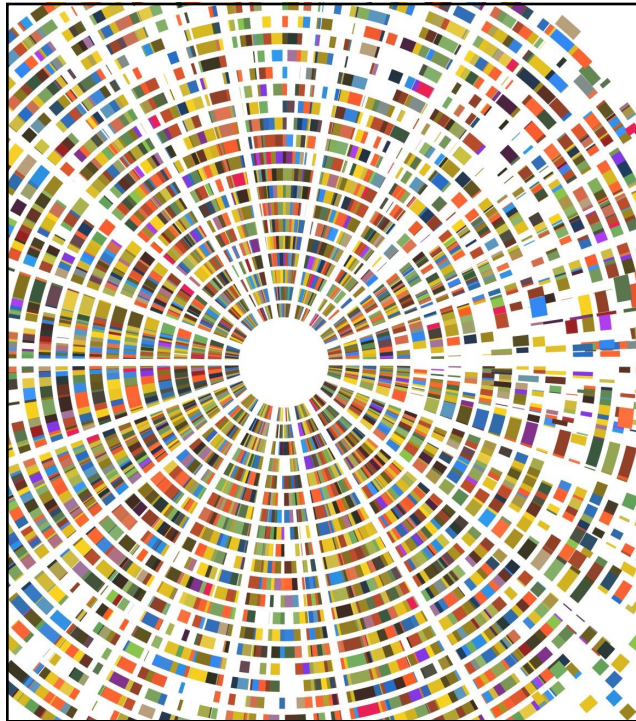


**Margaret M. Holman**  
President  
Holman Consulting

- Holman Consulting is a full service fundraising consulting firm, founded in New York City in 1991
- Served as Senior Vice President for Development and Communications at America's first and largest humane society, The ASPCA
- Held senior fundraising management positions at a variety of arts, health, and educational institutions throughout the country
- Emerita president of the Philanthropic Planning Group of Greater New York, was president of Women in Development in New York, and serves on the Greater New York Chapter of AFP Board
- Co-author of "The Complete Guide to Careers in Fund Raising" and "Major Gifts Fundraising"
- Contributing author of "The Nonprofit Consulting Playbook and Faithful Giving: The Heart of Planned Gifts"

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# Making the Most of your Legacy Society

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## What is a Legacy Society?

It's icing on the cake, not the cake.



## What is a Legacy Society?

- An integral part of your overall planned gift program.
- A method of communication and stewardship with your most loyal donors.
- The way for your charity to continue to be part of the family.

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## Why Are Legacy Societies Important?\*



Legacy societies are a common method of recognizing planned giving donors to a nonprofit organization, as **they offer an opportunity to acknowledge, thank, and engage donors for their future contributions during their lifetimes**



Typically, a legacy society aims to **recognize donors during their lifetimes, to cultivate donors in ways that might lead to an increase of the legacy, and to encourage new donors**



Many of these societies are **open to all individuals who make a planned gift to an organization and often have membership rosters to signal to donors, as well as to the larger public, the significance of planned gifts**



Through membership, **legacy societies offer donors the possibility to become more engaged with the organization and thus give them a sense of ownership**

\*2016 Planned Giving Study

## Why are Legacy Societies Important NOW?

- For donors to remain connected to your organization even after their annual giving stops
- To join a community of like-minded people who support your mission
  - Stelter: Discovering the Secret Giver

Age	% of US Population	% of People with bequest	% of People with wills open to making future bequest	% People without wills willing to make charitable bequest
40-54	37%	32%	38%	65%
55-64	28%	28%	25%	24%
65+	35%	40%	37%	11%

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## When to Start a Legacy Society?

- If you don't have one and have a planned gift program, NOW IS THE TIME.
- If you are beginning a planned gift program, NOW IS THE TIME.



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## Launching Your Society



- Compile the list of your current planned gift donors
  - Be sure they have really made a planned gift (bequest intention, charitable gift annuity, life insurance gift, gift from a retirement plan)
- Send a letter announcing the society
- When possible, visit the donors to say thank you and learn more about why they made the gift
- Develop an ad for your regular newsletter with an invitation of join as a charter member

## Legacy Society Names



*The Society of*  
**1899**  
CALVARY HOSPITAL



DANA-FARBER  
SOCIETY



THE PHILLIPS SOCIETY



YOUR LEGACY. EVERLASTING IMPACT.

## Legacy Society Names



*The Tombstone Society*



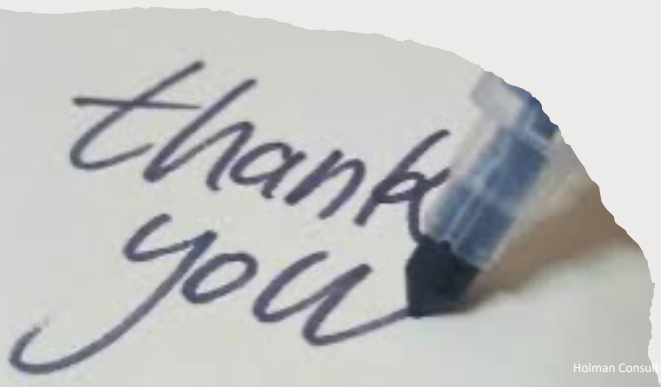
**The Pinebox Society**

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## Legacy Society Welcome Packet

- Write a letter
  - Signed by your executive director or your chairperson of the board
- List of benefits
- Invitation to an upcoming event
- A special item from your gift shop, or a book by someone close to the organization, or these days a customized face mask
- Pin



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## Marketing Legacy Societies

- **Multiple communication channels:**
  - Websites
  - Listing of Legacy donors in appropriate places
  - Will seminars
  - Direct mail
  - Reply cards
  - Advertisements

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Websites

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## Websites

- Keep it simple: it must work across many platforms

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## Legacy Society Ads

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Legacy Society  
Events:  
Invitations via  
Email

**The Metropolitan Opera**



Dear {{{\_L.Salutation##}} | Opera Lover |},

It is our pleasure to invite you to a complimentary Encore Society Day at the Met on Thursday, April 27, 2023. Please mark the date in your calendar and join your fellow Encore Society Associates in a special celebration of your commitment to the Met.

- The day begins at 10:30 a.m. with a working rehearsal of Mozart's *Don Giovanni*, with Nathalie Stutzmann scheduled to conduct a rehearsal with a cast that includes Ying Fang, Federica Lombardi, Ana Maria Martinez, Peter Mattei, Adam Plachetka, and Ben Bliss.
- A light lunch will be served during the rehearsal break.
- At 2:15 p.m., you will be able to attend an interview with Latoria Moore, who stars in *Aida*, *Champion*, and *La Bohème* this season.
- After the interview ends at about 3:30 p.m., you will be served afternoon tea, coffee, and dessert.

Please feel free to attend as much of the day as your schedule will allow. You may respond by completing and returning this form by April 18, or by contacting the Special Events office at 212.870.7492 or [specialevents@metopera.org](mailto:specialevents@metopera.org).

We hope you will enjoy this opportunity to get an inside look at the workings of the Metropolitan Opera. Your support greatly aids the Met's mission to continue presenting opera of the highest caliber for generations to come.

With thanks,

*Pamela Bennett*  
Pamela Bennett  
Director of Gift Planning

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 30 Lincoln Center  
 New York, NY 10023  
 212.362.6000  
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Peter Galla, Maria Montesi Strom General Manager  
 Yanick Nézet-Séguin, Jeanette Lerman-Neubauer Music Director

Photo: Jonathan Tisdler

This message was sent to {{{Email##}} | because you've signed up to receive Metropolitan Opera emails or agreed to our [Terms & Conditions](#). Review our [Privacy Policy](#).

Legacy Society  
Events:  
Invitations via  
Mail

**Steve Hill**  
Executive Director of Gift Planning  
University of Nebraska Foundation

cordially invites you and a guest to lunch  
and a special tour to recognize members of the

**University of Nebraska Foundation  
Burnett Society**

.....

**Friday, April 14, 2023  
Noon-2:00 p.m.**

**Biomechanics Research Building**  
University of Nebraska at Omaha  
6160 University Dr. S., Omaha, Nebraska

Noon - Lunch and brief program  
1:15 p.m. - Optional tour of Biomechanics  
Research Building  
*Business Attire*

Parking is available at the East Parking Garage  
4501 Dodge St., Omaha, Nebraska  
*See map for details.*

Kindly respond with the enclosed RSVP card by  
Wednesday, April 5, 2023. If you have questions  
regarding the event, please contact Piper Hoover at  
[piper.hoover@unofoundation.org](mailto:piper.hoover@unofoundation.org) or 402.458-1263.

**ONLY in NEBRASKA**  
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**Burnett Society Lunch and Tour**  
Friday, April 14, 2023  
Please reply by Wednesday, April 5

Name: \_\_\_\_\_

Lunch Selection:  
 Italian Focaccia Sandwich  
 BLTA Wrap  
 Wheatberry Hummus Sandwich (Vegetarian)  
 Dietary requests: \_\_\_\_\_

Guest: \_\_\_\_\_

Lunch Selection:  
 Italian Focaccia Sandwich  
 BLTA Wrap  
 Wheatberry Hummus Sandwich (Vegetarian)  
 Dietary requests: \_\_\_\_\_

Yes, I/we will attend lunch.  
 Yes, I/we will attend lunch and the Biomechanics  
 Research Building tour.  
 No, I/we send our regrets.

**Do you know someone who is interested in hearing  
more about supporting the University of Nebraska with a  
planned gift? If so, please invite them to join us on April 14.**  
 If you have questions about the event, please contact Piper  
 Hoover at [piper.hoover@unofoundation.org](mailto:piper.hoover@unofoundation.org) or 402-458-1263.

UNIVERSITY of NEBRASKA FOUNDATION

## Legacy Societies -- Best Prospects: FLAG

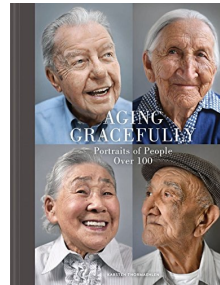
Those between 60-75



Those between 75-85



Those over 85



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## Who is eligible for Legacy Society Membership?

- Donors who have informed you of a gift by any of these means:
  - Bequest/Bequest Intention
  - Life Insurance
  - Charitable Gift Annuity
  - Charitable Remainder Trust
  - Charitable Lead Trust
  - Retirement Plan Designation
  - Endowed Fund

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## Who is in Your Legacy Society?

- Age does not matter.
- Realized vs bequest intents doesn't matter.
- Verification may matter.



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## Benefits of Legacy Society Membership

- Birthday cards
- Quarterly mailings from key staff and volunteer leadership
- Invitations to events
- Recognition on wall or on website or in an ad
- Certificate
- Pin



Warmly invites you and a guest to attend our  
ANNUAL MASS & MEMBER LUNCHEON

Thursday, June 6, 2019  
11 A.M.

Mass at the Main Altar  
to be followed by lunch at  
The 3 West Club, 3 West 51<sup>st</sup> Street at Fifth Avenue

Luncheon Speaker  
Reverend Monsignor Robert T. Ritchie  
Rector, St. Patrick's Cathedral

RSVP by May 22<sup>nd</sup>  
Phone:  
Email:

Seating is limited

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# Other Planned Gifts vs. Realized Planned Gifts



**LEGACY OF FAITH SOCIETY**  
ARCHDIOCESE OF NEW YORK  
2020

His Eminence, Timothy Michael Cardinal Dolan, Archbishop of the Archdiocese of New York, gratefully acknowledges our special benefactors who remember the efforts and charities of the archdiocese through legacy gifts made in their lifetime. The Legacy of Faith Society recognizes and honors those friends and parishioners of the Archdiocese of New York who have made a commitment to the future of our Church by including the archdiocese in their estate plans.

These gifts sustain an infrastructure of support that makes our parishes, schools and ministries stronger, more sustainable and better equipped to serve future generations. Cardinal Dolan invites you to join this important society of donors.

There are no dues associated with membership in the Legacy of Faith Society. With your permission, you will be listed in an announcement published in Catholic New York, and receive invitations to exclusive events through the archdiocese.

With a planned gift to the Archdiocese of New York, you will help sustain the Catholic Church for future generations and ensure your Catholic legacy.

**Members:**

<p>Mr. Eustachio Abrahante Mr. Thomas F. Ahearn Mr. Frank J. Altgier Ms. Eleanor S. Appinowhite Mr. and Mrs. Elias J. Astone Deacon and Mrs. Stanley J. Aviles Mrs. Mary Baede Ms. Mary Lou Balogh Ms. Rose Marie Barba Mr. and Mrs. Allan C. Barry Ms. Yvonne Beamchamp Mrs. Michelle A. Becker-Fliegel Mr. and Mrs. Allan Benson Reverend Emil L. Betley Mrs. Madeline D. Blount Mr. John J. Bowe Dr. David L. Levy and Ms. Amanda C. Bowman Mrs. Sally Boyer Mr. Frank A. Brudich Ms. Deirdre M. Brown Professor Thomas E. Buckley Mr. and Mrs. William A. Bulson Mr. and Mrs. Patrick M. Burgoyne Reverend Harry J. Burke Mr. and Mrs. Lewis L. Buttermark Mary Denise Canollare, Ph.D. Ms. Hugonette M. Cassone Mrs. Hillary Dawn Chamberlain Deacon Richard A. Cheu Ms. Lauretta Cochrane Ms. Gerald J. Colaisi Mrs. Lorraine P. Colangelo Mr. Joseph P. Connor Mrs. Helene A. Cooney Mrs. Suzanne P. Coppol Miss Doris M. Czirley Mr. and Mrs. Arthur P. Davis, III Mrs. Patricia A. Dempsey</p>	<p>Mr. and Mrs. James Di Lorenzo Reverend Joseph S. Dietz Mr. Gene V. Dinicelli Mr. Charles R. Disque Mrs. John J. Donnelly Mrs. Monique I. Finley Ms. Nancy S. Fitz-Horner Mrs. Edward C. Flanagan Mary Louise Formato, M.D. Reverend Joseph E. Franco Mr. Dominic J. F. Frank Ms. Margaret A. Frisch Mr. and Mrs. Mario L. Gabos Mrs. Ann A. Gaimster Ms. Carolyn J. Garcia Dr. B. Christian Gilbin Miss Marjorie Gilbert Ms. Ann L. Greenfield Mr. and Mrs. John C. Gustafson Mr. and Mrs. Peter A. Hagan Mrs. Dorothy Hamilton Mr. Joseph M. Hassett Mrs. Agnes Haervey Mr. and Mrs. John P. Heffernan Ms. Catherine H. Horan Ms. Kathleen M. Howley Mrs. Violet Idehen Reverend Robert P. Imbhill Mr. and Mrs. Joseph N. Isokano Mr. Paul H. Jalkowski Mrs. Kenneth and Marie-Louise Johnson Mr. and Mrs. Aloysius Kafel Mrs. Cecilia S. Kambha Ms. Lawson C. Kasahama and Ms. Bonita Walsh Ms. Antoneta M. Kazandzicva Mr. Gregory Kozic Miss Agnes B. Kehrer Mr. James F. Kennedy Mrs. Ardith D. Kenny Dr. and Mrs. John E. Knipp Mr. Thomas Krasovic</p>	<p>Mr. Terence A. Kreider Mr. and Mrs. Thomas M. La Guldice Mrs. Sally C. Laffond Mr. John D. Lesch Ms. Donna M. Lieske Mr. and Mrs. Leighton R. Longhi Mr. and Mrs. Anthony Longo Ms. Margaret Longo Ms. Helen T. Lowe Reverend Joseph Longo Ms. Alexandra V. MacDonald Mr. and Mrs. Raymond J. Mahoney Ms. Gina M. Manuel Ms. Anne J. Mautel Reverend Patrick J. McAndrew Ms. Mary C. McCabe Mr. Edward F. McDermott and Ms. Nancy Stein Mrs. Mary C. McGovern Reverend Monsignor Hugh F. McManus Miss Therese M. Meany Mr. Isaoerge Mendoza Mr. and Mrs. John Mooney Mr. and Mrs. Richard Moore Mr. and Mrs. Richard C. Mullen Mr. and Mrs. Timothy Murphy Mr. Bernard J. Murphy Mr. and Mrs. Edward Murphy Mr. Thomas S. Murphy, Sr. Mr. James P. Murray Mr. and Mrs. Bruce Nelson Mr. Daniel Norton Mrs. Barbara A. O'Brien Reverend Edward D. O'Donnell Reverend Joseph P. O'Hara Eugene and Louise O'Neill Mr. Dennis M. Orzo Ms. Patricia H. Otome Mr. Samuel M. Osterbridge Ms. Francesca F. Pannell Ms. Sheila S. Pashman Mr. Michael Passarella</p>	<p>Ms. Margarita Perusquia Ms. Victoria F. Peirabk Ms. Margaret Mary M. Perzolo Mr. and Mrs. Vincent J. Piscitelli Mr. Mariel E. Pleser Mr. and Mrs. Folpe Propper de Callejon Mrs. Katherine D. Quigley Miss Elizabeth A. Quinn Reverend Charles Quinn Mrs. Mary Rath Mrs. Margaret A. Rolly-Intalac Mrs. Reda R. Riley Mr. Carmine Roberto Mr. Vincent J. Romano Mr. and Mrs. John J. Routhledge Mrs. Joan Sackhoff Mr. and Mrs. Andrew W. Saunders Mr. and Mrs. Richard J. Schmoelk Ms. Susan A. Seagle Mr. Rudolph J. Sekaly Mrs. Jacqueline J. Sierra Rada Mr. Thomas E. Shuler Mr. and Mrs. Joseph Shurgart Mr. Robert J. Siegart Mrs. Patricia M. Simnett Ms. Mary Ellen Spiegel Mr. John E. Storey Mr. James Stropoli Mr. and Mrs. William P. Timmons, III Ms. Geraldine Timoney Mr. and Mrs. Neil J. Toomey Ms. Susan J. Trammell Mr. Thomas P. Tricari Reverend Monsignor Desmond J. Villa J.C.D. Rev. Father Guy Vinci Mr. Frank V. Vitacco Mr. and Mrs. Arthur J. White Ms. Dolores M. Wilks Mr. Klaus A. Wolters Ms. Philomena W. Wong Anonymous (2)</p>	<p><i>We salute in grateful remembrance the following members and friends from whom we received bequest, trust and charitable gift annuity distributions in 2022, and we offer sympathy to their families and loved ones:</i></p> <p>Ms. Geraldine D. Armstrong Mr. Thomas A. Binder Ms. Adrienne Bono Ms. Lola A. Cakagno Mr. and Mrs. Joseph P. Catera Reverend James P. Clark Ms. Anna M. Clarke Ms. Mary Chane Mr. and Mrs. Neil B. Colbert Reverend Monsignor James F. Cox Ms. Nancy Cunnane Mrs. Geraldine M. Drohan Mr. John J. Duffly Ms. Mary Denise Flynn Mrs. R.J. Fredricks Mr. James F. Gill Deacon Francis O. Lohren Ms. Regina M. McNamara Mr. Harold Rahl Mrs. Regina S. Riccardi Mr. Allan J. Riley Mr. Michael J. Rimaldi, Jr. Ms. Eric G. Russo Ms. Helen C. Tausch Mrs. Babette Thomasay Mr. Rudolph Toffanetti Mr. Frank D. Valente Mr. Robert C. West</p>
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*To learn more about how you can establish your Catholic legacy and join the Legacy of Faith Society, please contact:*

Archdiocese of New York  
Development Office - Planned Giving  
101 First Avenue, 14<sup>th</sup> Floor, New York, NY 10022  
Web: [plannedgiving.archdiocese.org](http://plannedgiving.archdiocese.org)  
E-mail: [PlannedGiving@archdiocese.org](mailto:PlannedGiving@archdiocese.org)  
Phone: (646) 794-3117

## Stewardship\*

- Survey them
- Prioritize them
- Know what motivates them
- Personalize *everything*
- Create an alumni feeling
- Include testimonials
- Make them feel like heroes
- Prove impact
- Call and visit
- \*MarketSmart

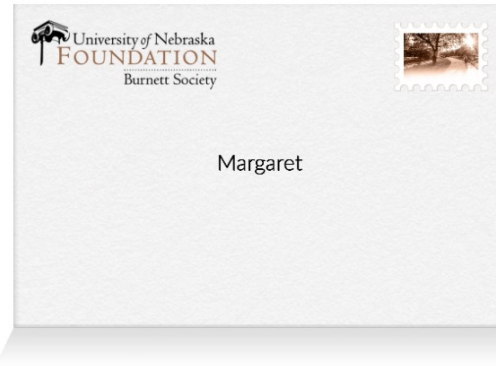




## Stewardship

Hi Margaret,  
Thank you for being a Burnett Society member and for your support of the University of Nebraska. As a member, you should have received an invitation to our annual lunch that will be held this year in Omaha on Friday, April 14 at the UNO Biomechanics Research Building.

A Message from Kim Waller



<https://nufoundation.thankview.com/video/6c666422f63e22079>

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## Conclusion

- Create and name your legacy society to reflect your organization's culture
- Determine how you will acknowledge and steward these donors
- If you are just beginning your society, establish a charter membership for the first two years
- Take the opportunity to include information about your legacy society in all of your marketing materials
- Find a board member or prominent volunteer to champion the society

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Margaret M. Holman  
President  
Holman Consulting

# Q&A

## Additional Questions

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[jen.lennon@stelter.com](mailto:jen.lennon@stelter.com)

[www.stelter.com](http://www.stelter.com)

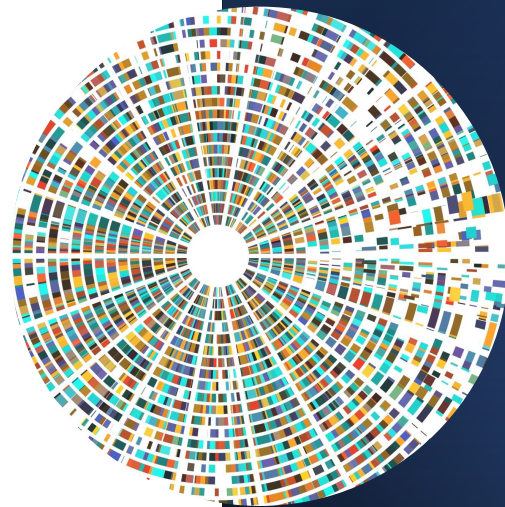
## Webinar Resources

Recording  
Presentation handouts

[www.stelter.com/webinars](http://www.stelter.com/webinars)

## Thank you & Good Luck!

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[www.holmanconsulting.com](http://www.holmanconsulting.com)



## Sources

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  - *The 2016 Planned Giving Study Building Lasting Legacies: New Insights from Data on Planned Gifts* by IUPUI and Pentera
  - MarketSmart; [imarketsmart.com](http://imarketsmart.com)
  - PG Marketing.com
  - Stelter: Discovering the Secret Giver
- Thanks to:
    - The Archdiocese of New York
    - The Metropolitan Opera
    - The University of Nebraska Burnett Society