

General Questions as Conversation Starters

- How do you feel about our mission, vision and work?
- Why do you support our mission?
- What is your perception of our performance?
- Do you believe your gifts to our mission are making a difference?
- Do you have something you want me to share with our CEO?
- Would you like more information on our plans going forward?
- What advice would you give our organization?

Major Gifts of Assets Questions

- Many of our donors, especially those who have been with us over the years, would like their children and grandchildren to be a part of our philanthropic family. To what extent is that important to you?
- Would you be willing to include helping individuals through our organization in your estate plans?
- How do you currently involve your heirs in your philanthropic interest?
- Are there others who have similar interest to you in willing to help others through our organization? How might we reach out to them?
- What do you hope to achieve through your giving?
- What would you do with the money, if you won the lottery?
- How did you teach your family about giving to help others?
- Have you or your spouse ever considered endowing our annual gift?
- Have you ever considered creating a charitable trust or annuity that paid you each year? Would you like to know more?
- Have you ever thought of making a gift to honor or memorialize a loved one?
- Endowments are so very important to our organization, have you ever considered setting up an endowment? Would you like to know more?
- There are so many ways you, your spouse, children and grandchildren can receive income from an interesting charitable method. Would you like to hear more? Others have found it can really help them pass on a meaningful income to heirs while helping others. Would you be open to seeing how that works with no pressure or obligation? You might find it worth considering.
- You have been such a great partner to our organization, have you ever thought about including us in your estate?
- Some believe it is important to leave something to help others from their estate, what do you think?
- What causes you to worry?

Questions About Family

- Tell me about your children and grandchildren.
- How often do you get to see them?
- Did you get to take time off this year? Where did you get to go?
- Would your heirs enjoy learning more about our mission? How can we make that happen?
- Would your family enjoy a tour of our organization?

Propensity to Give

- I love this (artwork), do you enjoy collecting?
- How did you find this (art)?
- Many people who are financially sound believe they should ensure their heirs' future, while others believe children should make their own way. What do you think?
- What was the best business decision you ever made? Why was it so important?
- What was the best personal decision you ever made? Why was it so important?
- What was the best philanthropic decision you ever made? What was the impact on others?
- Why are you so generous?
- When you hear about our efforts for the future, which ones do you believe to be the most important? How would you rank them?

Capacity to Give

- How is business?
- Has the economy affected you?
- How did you decide on a career?
- What has been the best investment you have ever made?

Engaging Others

- Do you know of others who would love to learn more about our mission? How should we make that happen?
- We would love for you to bring your friends for a tour! Would you be interested?

Questions to Follow-up Statements

- Why?
- How so?
- Would you tell me more?
- How did that happen?
- How do you feel about that?
- Are you ready to learn more?
- Are you ready to take the next step?

About Gift Clarity

Gift Clarity helps nonprofits get better fundraising results from their limited time and resources by providing a strategic roadmap for intentionally connecting with donors.

