Anatomy of a Legacy Website
(that’s ALL about the donor)

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So, what can we do with this bit of time?

- start thinking of legacy web pages differently
- construct one from the donor’s point of view
- look at the why, what and how of it
- break down the anatomy of a real site
- compare the sample site to yours
- and maybe I’ll make you feel a bit itchy!
### Contradictory Approaches

<table>
<thead>
<tr>
<th>the ‘planned giving’ way</th>
<th>the ‘Iceberg’ way</th>
</tr>
</thead>
<tbody>
<tr>
<td>focus on money</td>
<td>focus on donor</td>
</tr>
<tr>
<td>talk about WHAT and HOW</td>
<td>emphasize WHO and WHY</td>
</tr>
<tr>
<td>focus on charity</td>
<td>focus on cause/mission</td>
</tr>
<tr>
<td>give a menu of options</td>
<td>stay with the will</td>
</tr>
<tr>
<td>talk about finance</td>
<td>talk about philanthropy</td>
</tr>
<tr>
<td>think about tax savings</td>
<td>feel love and compassion</td>
</tr>
<tr>
<td>be instructional</td>
<td>be inspirational</td>
</tr>
<tr>
<td>educate</td>
<td>motivate (persuade)</td>
</tr>
<tr>
<td>assume the gift is coming</td>
<td>assume the prospect feels deeply for the cause</td>
</tr>
</tbody>
</table>

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**Support the Planned Giving Program of the Society**

**What is a Planned Gift?**

A planned gift is a significant gift that you plan to give now or in the future. A planned gift to the XIX Society of XX shows both generosity and foresight. There are few other ways that you can help so many people. We understand the importance of your gift and we will make sure that it is used wisely.

Planned giving benefits both the giver and the receiver. To maximize these benefits, the gift should be carefully arranged with the help of both the society and your financial, legal or tax advisor. This way you can determine what best suits your lifestyle, make the best use of your assets, and maximize your tax savings.

**Planned Gifts:**
- wills and bequests
- charitable remainder trusts
- gifts of annuities
- gifts of life insurance
- gifts of residual interest
- outright gifts of cash and donor-advised funds
- gifts of publicly traded securities and mutual funds

*(This is the blah blah that most of us are using now)*

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we’re going to look at 8 screen shots – watch closely and see if you read these words

- money
- estate
- plan
- planning
- net worth
- legal
- accountant
- lawyer
- remainder trust
- planned giving
- annuity
- insurance
- TAX!
prime real estate
mission-focused language

empathy/autobiography
the donor drives the bus

don’t assume the gift is coming
don’t presume to go to HOW this soon
great legacy fundraisers are a humble lot

focus on RESPECT – asking, not telling
nothing mirrors like a story

Joan Kroc & social proof
From ‘donor’ to ‘philanthropist’
Where does 95% of the money come from?
Don’t even try to compete with the kids.

Even the HOW is donor-focused
Bare essentials

Donor’s life story
WHY, not HOW
Wills only
Storytelling
Heart first, head later

Last but not least:
It’s NOT about money!

Artful Persuasion: 32 Tips
State of the Legacy Nation 2014
Iceberg Philanthropy

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