

NATIONAL ESTATE PLANNING AWARENESS WEEK

Only about 1 in 3 adults have a will, and many people don't realize a will is only part of an estate plan. If someone has not planned their estate, there is virtually no chance they have arranged to leave a gift to your organization. In fact, we've found that only 4% of your supporters have included your organization with an estate gift.

National Estate Planning Awareness Week is a perfect opportunity to invite your supporters into the Thompson & Associates planning process! You can remind them about the importance of an estate plan for them and their loved ones and encourage them to take advantage of our services. Not only will your supporters have peace of mind knowing they have provided for their loved ones, 63% of those who complete our process choose to include the sponsoring organization in their estate plans.

We're here to help you get the conversation going! We've provided a summary of tax-smart giving ideas for the remainder of the year along with a script and sample questions for you. Please take advantage of these free resources to connect with your supporters!

Sample Script

"I'm calling to let you know that next/this week is Estate Planning Awareness Week. I am taking this opportunity to encourage you to make sure you have a complete estate plan in place that accurately reflects your values and goals, including a will or trust, powers of attorney for financial and medical decisions, and a living will."

"I encourage you to not delay in updating your documents and beneficiary designations. Maybe set a deadline to get everything updated by the end of the year. Getting this done will give you peace of mind! If the opportunity arises as you update things, we would love for you to include our organization in your final plans."

Tailored Responses

Those who have no planning: *"We would love to offer you a confidential, values-based estate planning service, as our gift to you. This service is provided by Thompson & Associates as an objective third party, and is completely confidential – no one from the Foundation will be present during these meetings or be privy to the information shared with them. They do not sell any products, solicit gifts or report back to the nonprofit."*

Those with older plans (not drafted within the last few years)*: *"With tax law, family or circumstantial changes, now is a great time to review your existing plan."*

Those with new plans (drafted within the last few years)*: *"That's wonderful! We'd love to offer you a complimentary review to ensure your new plan doesn't have any gaps and accomplishes exactly what you intend."*

*For more example responses on how to further encourage those with plans in place to join the process, click [here](#).



Call to Action

- *"I invite you to meet with our associate, _____, confidentially. _____ has partnered with us for ____ years walking families through a structured process that helps evaluate their personal values and financial circumstances to develop a comprehensive estate plan that they then take to their own attorneys and financial advisors to put into action."*
- *"This service, through Thompson & Associates, is completely confidential, available at no cost to you with no obligations whatsoever. It's simply our gift to you for being such a wonderful supporter of ours!"*
- *"Would you be interested in an introductory meeting with _____, to see if this is something you'd like to do?"*

Conversational Questions and Talking Points

Below are some simple questions and talking points to help you build conversations around estate planning. Beyond National Estate Planning Awareness week, begin peppering these important questions into your regular discussions with your supporters!

- *"We know the economic and political environment have caused financial and legacy concerns and many are searching online for do-it-yourself Wills."*
- *"Do you have a properly prepared, updated and executed will, powers of attorney and medical directives?"*
- *"Have you made appropriate provisions to account for all children?" (or "heirs," if applicable)*
- *"Are the named executors, trustees and guardians still appropriate?"*
- *"Do beneficiary designations on all life insurance and retirement accounts compliment your will and/or trust?"*
- *"Have you considered making provisions for charities in your estate plan?"*
- *"If you want to do something for charity from your estate, current laws make it very attractive to give outright to charity from a retirement account." (Review SECURE Act resources [here.](#))*

