

**Practice Scenario 1:**

You are: The Solicitor

You will be speaking with:

The longtime consistent donor who has given $100 every year for 20 years. They are 65 years old. They believe the organization is very important to the community. As a retiree, they are concerned about having enough money to live on in the future. They have no children. Their investments took a hit recently.

 Your job is to:

1. You have already called the donor and scheduled an in-person visit.
2. During the visit, have a conversation – find out why they have been such a consistent supporter of the organization.
3. Your goal is to thank them and try to secure their investment in the endowment fund. Consider asking for an appropriate type of future gift like a gift in a will, trust, retirement fund, or life insurance.
4. Respond as necessary given the conversation and schedule another meeting if need be.



**Practice Scenario 1:**

You are: The Long-time Supporter

You have been a modest donor ($100) every year for 20 years. You feel this organization is very important. You are retired and your investments took a bit of a hit recently. You are single and a little concerned about your situation but not enough to stop giving annually.

Your job is to:

1. “Meet” with the organization’s representative
2. Raise objections as they come up.
3. Eventually agree to something - either another visit or an endowment investment, either through a current or legacy gift.