



Black Belt Gift Planning



10 Stages to Becoming a Master
By Alexandra Pia Brovey, JD, LLM



 **Northwell
HealthSM**

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***"The ultimate aim
of the art of Karate
lies not in victory or defeat,
but in the perfection
of the character
of its participants."***

Gichen Funakoshi

 **Northwell HealthSM Foundation**

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Introduction



- The **ten stages** highlight a typical path.
- Throughout each stage I will:
 - Discuss actions and lessons learned
 - Explore gift scenarios
 - Share real donor stories
 - Uncover training opportunities



Stage 1: *Ichi*

“Spirit first, technique second.”

Gichen Funakoshi





Stage 1: *Ichi*

Action

Know & embrace
your organization's *mission*.

Develop good relationships
with your colleagues.



Stage 1: *Ichi*

Gift scenario

Gifts in wills and trusts.

- Identify key bequests
- Profile living donors



Stage 1: *Ichi*

Start the conversation:

**“Thanks for being a donor for xx years.
What motivated you to make your
first gift?”**



Listen! (Don't just hear)



Stage 1: *Ichi*

Giving USA (2016):

- In 2015, charitable giving exceeded \$373 billion.
- Charitable bequests = 9% of total giving (31.76 B).

Spend at least 50% of your time on bequests.





Stage 1: *Ichi*

Donor story

Dentist's unique gift to his dad

Training idea

Join PPP



Stage 2: *Ni*

***"Someone is enjoying shade today
because someone planted a tree
a long time ago."***

Warren Buffet



Stage 2: *Ni*

Recap Stage 1:

Be enthusiastic. Build key relationships.
Get involved with PPP.

Action

Discover your donors.
– legacy society members
– consistent/annual donors



Stage 2: *Ni*



Visit a prospect with just your smile.

Goal: get to the “Why?”

Interaction

What do you bring to a meeting?



Stage 2: *Ni*

Donor story

Wife of a hospital founder

Training idea

Join your local planned giving council

- Training
- Networking
- Inspiration



Stage 3: *San*

***“A good head
and a good heart
are always a
formidable combination.”***

Nelson Mandela



Stage 3: *San*

Recap stages 1-2:

Stage 1: Be enthusiastic; build key relationships; get involved with PPP.

Stage 2: Reach out to donors; ask “Why”; join your local planned giving council.



Stage 3: *San*

Action

Form your own network



Success is a mix of hard and soft skills.



Stage 3: *San*

Hard skills

- #1: Technical expertise.
- #2: Precision and detail-oriented work.
- #3: Background in legal or finance fields.

Soft skills

- #1: Being a good listener.
- #2: Patience.
- #3: Collegiality.
- #4: Responsiveness.



Stage 3: *San*

Interaction

What are other hard and soft skills?

Gift scenario

Beneficiary designations



Stage 4: *Shi*

***“People don’t care
how much you know
until they know
how much you care.”***

Mike McNight



Stage 4: *Shi*

Recap stages 1-3:

Stage 1: Be enthusiastic; build key relationships; get involved with PPP.

Stage 2: Reach out to donors; ask “Why”; join your local planned giving council.

Stage 3: Hone both hard and soft skills; create a network; attend a conference.



Stage 4: *Shi*

Action

Read, read, READ!



Take your donors as you find them.



Stage 4: *Shi*

Charitable Gift Annuities

- Tangible goals
- Intangible goals





Stage 4: *Shi*

Trend

Fewer CGAs at higher amounts

Donor story

Flexible CGAs for younger donors

Training idea

A Webinar



Stage 5: *Go*

***"The things which are not measurable
are more important than those
which are measurable."***

Alexis Carrel



Stage 5: Go

Recap stages 1-4:

Stage 1: Be enthusiastic; build key relationships; get involved with PPP.

Stage 2: Reach out to donors; ask “Why”; join your local planned giving council.

Stage 3: Hone both hard and soft skills; create a network; attend a conference.

Stage 4: Read; find common interests; pursue “win-win” gifts.



Stage 5: Go

Action

Know your metrics.

Some common metrics:

1. Increase in legacy society members.
2. Increase in gift commitments.
3. Dollars raised.
4. Substantive contacts.



Stage 5: *Go*

Review your goals

- Did you achieve the goals you set?
- Do you have a strategic plan?



Stage 5: *Go*



Donor-centered fundraising works.

Training idea

Seek teachable moments.

Tools

Trainings/tips/ads



Stage 5: *Go*

Gift scenario/Donor story
Charitable Remainder Trusts

Husband with a pension created
an income stream for his wife.

*There is no substitute
for time in the trenches.*



Stage 6: Roku

“A shepherd has the duty of taking his cattle to the river very day, but it’s up to the animal to drink the water.”

Oyama-sosai



Stage 6: Roku

Recap stages 1-5:

Stage 1: Be enthusiastic; build key relationships; get involved with PPP.

Stage 2: Reach out to donors; ask “Why”; join your local planned giving council.

Stage 3: Hone both hard and soft skills; create a network; attend a conference.

Stage 4: Read; find common interests; pursue “win-win” gifts.

Stage 5: Pursue your goals; know your metrics; be donor-centered.

 Stage 6: *Roku*

Action

Actively seek relationships with allied professionals.

*I cannot guarantee an advisor a client.
An advisor cannot guarantee me a gift.*

 Stage 6: *Roku*

Gift scenario/Donor story

Gift of real estate

NJ vacation property into a CRT

Training idea

Invite an advisor to make a presentation



Stage 7: *Shichi*

*"The purpose of **knowledge**
is not to have it.
It's to share it.*

*That's when it turns to **wisdom.**"*

Jesse Encamp



Stage 7: *Shichi*

Recap stages 1-6:

Stage 1: Be enthusiastic; build key relationships; get involved with PPP.

Stage 2: Reach out to donors; ask "Why"; join your local planned giving council.

Stage 3: Hone both hard and soft skills; create a network; attend a conference.



Stage 7: *Shichi*

Recap stages 1-6 (cont.):

Stage 4: Read; find common interests; pursue “win-win” gifts.

Stage 5: Pursue your goals; know your metrics; be donor-centered.

Stage 6: Build relationships with allied professionals; seek teachable moments.



Stage 7: *Shichi*

Action

Be proactive!

- Do not wait for your **colleagues** to come to you.
- Do not wait for your **donors** to call you.
- Do not wait for your **boss** to thank you.

 Stage 7: *Shichi*

 Step out of your comfort zone!

Gift scenario/Donor story

Blended gift: **outright pledge + bequest**

Training idea

Mentor a colleague

 Stage 8: *Hachi*

*“What we do today,
right now,
will have an accumulated effect
on all our tomorrows.”*

Alexandra Stoddard



Stage 8: *Hachi*

Recap stages 1-7:

Stage 1: Be enthusiastic; build key relationships;
get involved with PPP.

Stage 2: Reach out to donors; ask “Why”;
join your local planned giving council.

Stage 3: Hone both hard and soft skills;
create a network; attend a conference.

Stage 4: Read; find common interests;
pursue “win-win” gifts.



Stage 8: *Hachi*

Recap stages 1-7 (cont.):

Stage 5: Pursue your goals; know your metrics;
be donor-centered.

Stage 6: Build relationships with allied professionals;
seek teachable moments.

Stage 7: Step outside of your comfort zone;
be proactive; serve as a mentor.



Stage 8: *Hachi*

Action

Be a leader!



There is a network of colleagues across the US who are willing & able to help you.



Stage 8: *Hachi*

Gift scenario/Donor story

Blended gift: **outright + CGA**

Training idea

Ask your *colleague* to present a blended gift success story

TT Stage 9: *Kyu*

“Heart, instinct, principles.”

Blaise Pascal

TT Stage 9: *Kyu*

Recap stages 1-8:

Stage 1: Be enthusiastic; build key relationships;
get involved with PPP.

Stage 2: Reach out to donors; ask “Why”;
join your local planned giving council.

Stage 3: Hone both hard and soft skills;
create a network; attend a conference.

Stage 4: Read; find common interests;
pursue “win-win” gifts.

TT Stage 9: *Kyu*

Recap stages 1-8 (cont.):

Stage 5: Pursue your goals; know your metrics;
be donor-centered.

Stage 6: Build relationships with allied professionals;
seek teachable moments.

Stage 7: Step outside of your comfort zone; be proactive;
serve as a mentor.

Stage 8: Be a leader; embrace colleagues as the key to success.

TT Stage 9: *Kyu*

Action

Apply to PPP's Leadership Institute



Forge your own path!

TT Stage 9: *Kyu*

Gift scenario/Donor story

Blended gift: **bequest + retirement plan**

Training idea

A scenario where the gift did *not* happen

Stage 10: *Jyu*

*"From white belt to black belt
you shape the tool,
at black belt you start
to learn how to use it."*

Unknown



Stage 10: *Jyu*

Recap stages 1-9:

Stage 1: Be enthusiastic; build key relationships; get involved with PPP.

Stage 2: Reach out to donors; ask “Why”; join your local planned giving council.

Stage 3: Hone both hard and soft skills; create a network; attend a conference.

Stage 4: Read; find common interests; pursue “win-win” gifts.



Stage 10: *Jyu*

Recap stages 1-9 (cont.):

Stage 5: Pursue your goals; know your metrics; be donor-centered.

Stage 6: Build relationships with allied professionals; seek teachable moments.

Stage 7: Step outside of your comfort zone; be proactive; serve as a mentor.

Stage 8: Be a leader; embrace colleagues as the key to success.

Stage 9: Follow your instincts; pursue blended gifts.



Stage 10: *Jyu*

What I learned

I am now ready to begin learning!

Gift scenario

Anything that comes your way!

Conclusion

Recap stages 1-10:

Stage 1: Be enthusiastic; build key relationships;
get involved with PPP.

Stage 2: Reach out to donors; ask “Why”;
join your local planned giving council.

Stage 3: Hone both hard and soft skills;
create a network; attend a conference.

Stage 4: Read; find common interests;
pursue “win-win” gifts.

Stage 5: Pursue your goals; know your metrics;
be donor-centered.

Conclusion

Recap stages 1-10 (cont.):

Stage 5: Pursue your goals; know your metrics;
be donor-centered.

Stage 6: Build relationships with allied professionals;
seek teachable moments.

Stage 7: Step outside of your comfort zone; be proactive;
serve as a mentor.

Stage 8: Be a leader; embrace colleagues as the key to success.

Stage 9: Follow your instincts; pursue blended gifts.

Stage 10: Keep learning; be open to whatever comes your way.

*“When nothing seems to help
I go and look at the stonecutter
hammering away at his rock perhaps a hundred times
without so much as a crack showing in it.
Yet at the hundred and first blow it will split in two,
and I know it was not that blow that did it—
but all that had gone before.”*

Milo Schultz

Thank You



Alexandra Pia Brovey, JD, LLM
Senior Director, Gift Planning
Northwell Health Foundation
125 Community Drive
Great Neck, NY 11021
(516) 465-2610
abrovey@northwell.edu

