



Planned Giving Survey – Student Caller Script

SUMMARY

Tonight we will call alumni from the Class of 1995 and older. Although they may not have given much thought to their long term charitable planning, this call is a perfect opportunity to introduce this idea. They have given to Brown in 8 out of the past 10 years. These are very loyal donors who likely have a strong affinity for the University.

Some of the most transformational gifts an institution receives come in as legacy gifts such as a will provision or a retirement plan beneficiary designation. [*Maddock Alumni Center was given to the University through an estate!*] An increase in legacy gifts will benefit future generations of students, faculty, and research while also allowing the University to engage in long-term, strategic planning.

- The College Hill Society recognizes alumni/ae and friends who have remembered Brown through a gift in their will or retirement plan.
- More than 1,200 alumni/ae and friends are members of the College Hill Society.
- Alumni from classes as recent as 2014 have joined the College Hill Society.

This is the third year that the student callers have surveyed alumni about their charitable plans. Each year we increase the number of new College Hill Society members identified through calling. **One call last year led to the identification of a \$600,000 estate gift to Brown!**

GOALS

- Discover alumni who have included Brown in their estate plans, but have not yet let us know.
- Plant the seed of charitable planning at Brown and indirectly educate donors about this way of supporting Brown

INTRO

Good afternoon/ evening __[name]__. I'm a student calling from Brown. **This is not a solicitation call and will only take 5 minutes.** I am surveying alumni like you who are loyal donors to the University. Do you have time to speak with me?

QUESTION #1

If YES – Begin Survey – Move to next question

If No – “Okay, I understand. Have a nice evening!” – Code call as Survey Declined

QUESTION #2

You have been consistently giving to Brown for many years, THANK YOU!
May I ask what has motivated you to give back to Brown year after year?

Use text box to fill in donors answer, please provide as much detail as possible.

QUESTION #3

Many loyal alumni, like you, have included Brown in their estate plans. In addition to taking care of your family, have you ever considered naming Brown as a partial beneficiary of your retirement plan or including the University in your will?

YES, I have DONE it:

- a. Terrific. May I ask what inspired that decision?
- b. What program or area of Brown might you like your future gift to support?
- c. Can we follow up with a College Hill Society welcome packet for donors like you who have included Brown in an estate plan?

YES, I have CONSIDERED it:

- a. Where would you want your future gift to make an impact at Brown?
- b. Have you included other charities in your estate plans?
- c. What would it take to get Brown to be included?
- d. Are you interested in learning more about how other alumni have supported Brown through different kinds of legacy gifts?

NO, I have NOT done nor considered it:

- a. Thank you so much for your time and for your consistent generosity. Have a great night!

Use text box to fill in donors answer, please provide as much detail as possible.

CONCLUSION

Thank you for your time! We appreciate your feedback. Have a nice night!

OUTCOME OPTIONS

Complete – Survey Taken / Survey Declined
Incomplete – Answering Machine / Callback

COLLEGE HILL SOCIETY

Members of the College Hill Society are recognized with:

- Annual recognition event
- A listing in Brown publications
- Periodic College Hill Society mailings
- A special memento

WEBSITE

PlannedGiving.brown.edu