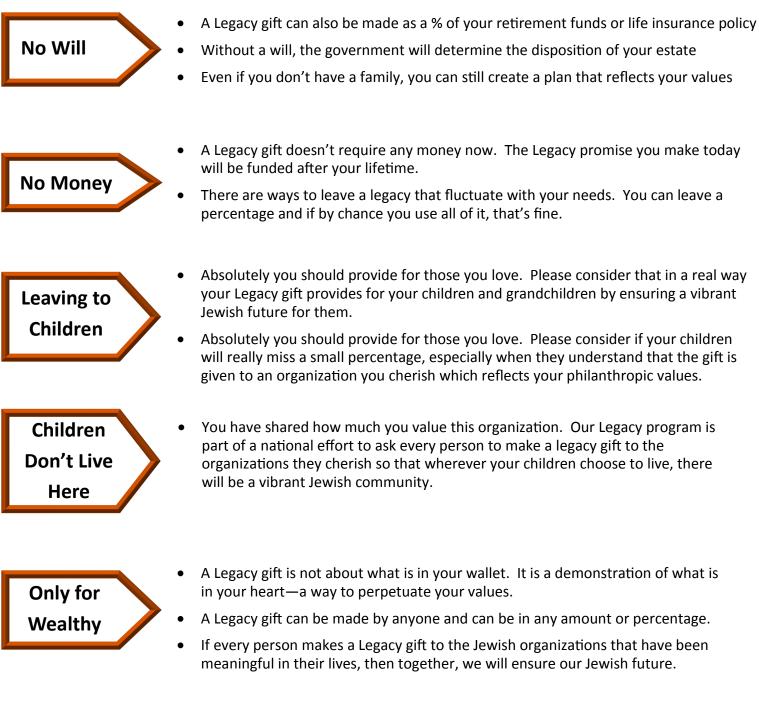


Best Responses to Common Objections in a Legacy Conversation





Best Responses to Common Objections in a Legacy Formalization Conversation

Objection	Response
Don't have a Will	Life insurance and Retirement funds only require a "change of beneficiary" form with no cost. Fund Agreement also no cost
Not sure how to provide for organization	Most common: % in Will, or Trust, named beneficiary of Life Insurance or Retirement Fund. Federation staff can meet and review options.
What if I need my money?	Legacy gifts are after-lifetime so your money is available for all of your needs
Changed my mind, no longer want to give	Can you share with me why you have come to this decision? (no matter the response, be sure to thank for ongoing support)
I will get to it eventually	Thank and remind of incentive grant and deadline. Make a time to check back.