

Best Responses to Common Objections in a Legacy Conversation

No Will

- A Legacy gift can also be made as a % of your retirement funds or life insurance policy
- Without a will, the government will determine the disposition of your estate
- Even if you don't have a family, you can still create a plan that reflects your values

No Money

- A Legacy gift doesn't require any money now. The Legacy promise you make today will be funded after your lifetime.
- There are ways to leave a legacy that fluctuate with your needs. You can leave a percentage and if by chance you use all of it, that's fine.

Leaving to Children

- Absolutely you should provide for those you love. Please consider that in a real way your Legacy gift provides for your children and grandchildren by ensuring a vibrant Jewish future for them.
- Absolutely you should provide for those you love. Please consider if your children will really miss a small percentage, especially when they understand that the gift is given to an organization you cherish which reflects your philanthropic values.

Children Don't Live Here

- You have shared how much you value this organization. Our Legacy program is part of a national effort to ask every person to make a legacy gift to the organizations they cherish so that wherever your children choose to live, there will be a vibrant Jewish community.

Only for Wealthy

- A Legacy gift is not about what is in your wallet. It is a demonstration of what is in your heart—a way to perpetuate your values.
- A Legacy gift can be made by anyone and can be in any amount or percentage.
- If every person makes a Legacy gift to the Jewish organizations that have been meaningful in their lives, then together, we will ensure our Jewish future.



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.