

SCRIPT FOR ADVISERS TO RAISE WITH CLIENTS.

□ THE PROBLEM

- A number of high net worth clients like you have been surveyed and were unhappy about how the giving environment works for them. They complain of too many frustrating direct marketing and cold calling campaigns... whether over the phone, in the street or those expensive mail packs...
- Here's the sad 60/40 rule that is operating in the current giving environment:
 - 60% of all donations are **one-off spontaneous donations** often triggered by these direct marketing campaigns; and
 - On average, 40% of donations made this way **don't make it to the charity**...they go to the commercial agency groups that run these campaigns. (in some cases, it's actually higher)

□ THE SOLUTION

- So now there's an alternative it's called **Flexible Planned Giving** and it's created by a non-profit, Invest2Donate, set up by a group of retired financial advisers and consultants who believe we can positively impact the way Australian donate to charity.... and we think it's a great concept.
- All that's required is for donors to **Plan Ahead** their giving and set up **regular giving** so charities don't incur these high costs of having to ask for donations and then have to continually re-ask.
- And charities love **Flexible Planned Giving** because not only does it help them save these high costs, but **Regular** donations are the most attractive to charities because the predictability of fund flow enables them to be more effective in doing the good things they do.

□ STARTING IS EASY

- Invest2Donate makes it all easy with their Donation Planner Tool that can help you **choose your charities** and then **links you direct to your charity** to set up the giving.
- (Show them the Tool)The online Donation Planner tool couldn't be easier as you can see here, and you can go to Invest2Donate 's website, just like I've just done, to download the Donation Planner and start giving through this smarter way...**or if you like, after were finished, my assistant can work through it with you and set up your Giving Plan before you leave today...??**

□ WE ARE IMPARTIAL

- We have no links or ties to Invest2Donate and receive no payments and make no recommendations as to specific charities... that's your call. But we support it and think it can change giving for the better.

□ CALL TO ACTION

- As they say, all you have to do is Invest a little time 2 Donate... and as I mentioned my assistant is able to save you some of that time if you would like??... (await the response)
- I'll leave you with the Flexible Planned Giving Guide which as you can see summarises the concept and guides you through a few simple steps to get started.
- One favour, would you mind letting Invest2Donate call you directly to ask for feedback on the concept? OR... letting me contact you in a few days to gather some feedback that will be important in helping develop the concept?