

## HELPING ADVISERS INTRODUCE A NEW WAY OF GIVING TO CLIENTS

### **STARTING THE CONVERSATION:**

Donating to charity been the same since Adam was a boy, and a retired financial planner believes that, from a donor's perspective, the system is broken. And he's set up a non-profit called *invest2donate* to fix it.

Here why he thinks it's broken:

1. DONORS ARE BOMBARDED with cold call requests to donate spontaneously. That is, they respond when asked...whether phone calls, emails, expensive mail packs, or door-to-door/in the street. And it causes **FRUSTRATION** that leads to dis-engagement.
2. When donors learn that the REAL COSTS OF ASKING\* for these donations averages 40% of the donations (or MORE in some cases), it is likely to cause **ANGER**. And that's just to get the donation to the front door of the Charity, not counting the charity's own costs once it has the donation.
3. And in addition, with 55,000 registered charities, there's plenty of **CONFUSION**

In fact, **60% of donors give SPONTANEOUSLY and worse still ONE-OFF**... which means each year they have to be re-asked.

So, the **SOLUTION?** According to *invest2donate*...make it easy for donors to **plan ahead** to save the cost of asking, and **setup regular giving** so the charity doesn't need to keep re-asking. Its **DONATION PLANNER** tool does this. And if you need help or reassurance in selecting the charities ... it can help with that too.

**(“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 is a great initiative. It gives donors a smarter way to donate and also gives Charities a better way to receive, because charities can have greater impact with regular, predictable fund flow.)

If you're interested I can show you their website and the **DONATION PLANNER** Tool.

*If the client is at this point disinterested, at least leave them with the Giving Guide in case they change their mind.*

### **IF THE CLIENT IS OPEN TO LEARNING MORE:**

The **DONATION PLANNER** tool is on *invest2donate's* website and here it is.

Step 1 ...Step 2...Step3 ...

All the Donor FAQs are answered in the FAQs tab, including the most obvious...Q: who pays the costs of this? A: All costs are funded from private and corporate sponsorship.

### **IF THE CLIENT ENGAGES...**

*(if the client is keen to proceed or is a little inexperienced in using online tools, you may like to offer your/your assistant's help...)*

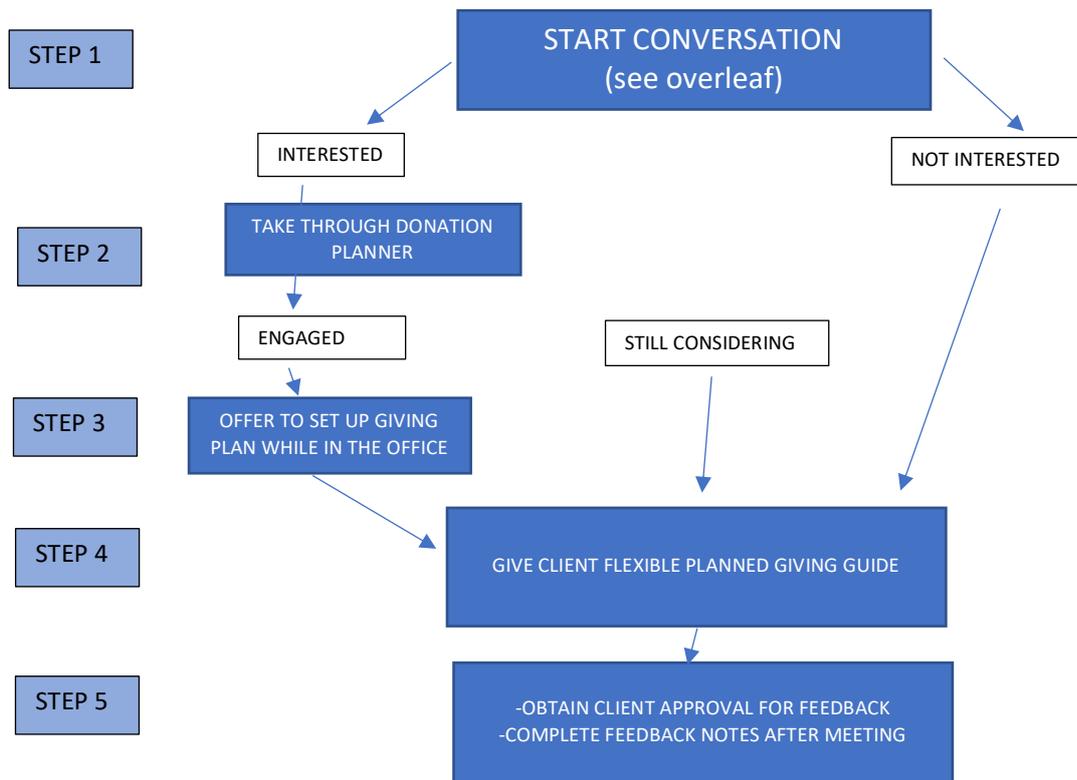
If you want to get things going now, I/ my assistant can help guide you through the Donation Planner before you leave today.

*(Otherwise give them The Giving Guide.)*

### **FEEDBACK PERMISSION:**

*(Seek client approval to be contacted, say in a week, by your assistant for anonymous feedback on the service. Show them the Donor Feedback form so they know what will be asked of them and how quick it will be. Feedback on this initiative is required in order to continue the ongoing sponsorship funding to ensure costs to charity and donor continue to be nil. Be available to provide your feedback via monthly phone call.)*

**HOW ADVISERS CAN MAKE A DIFFERENCE IN CLIENT MEETINGS...IN 5 STEPS.**



\*The **Flexible Planned Giving Guide**, the **Donation Planner**, the **Client Communication** aides, and the **Feedback Forms** are all available on our website [invest2donate.org.au](http://invest2donate.org.au)

**MEETING FEEDBACK NOTES** (to complete after meeting)

CLIENT NAME..... DATE.....

CLIENT RECEPTIVE:

- Y
- N
- UNDECIDED

CLIENT COMMENTS

.....  
 .....

YOUR COMMENTS

.....  
 .....

**IMPLEMENTATION**

- CLIENT USED DONATION PLANNER TO **SET UP FLEXIBLE PLANNED GIVING**
  - WITH YOUR ASSISTANT’S HELP
  - WITH YOUR HELP
- CLIENT INDICATED **WOULD** IMPLEMENT AT HOME
- CLIENT INDICATED **WILL CONSIDER** IMPLENTING AT HOME