

## **EXCITING NEW DEVELOPMENT**

### **INTRODUCE THE CONCEPT IN CLIENT REVIEW MEETING (Under “New Developments”)**

A retired Financial Planner is introducing a clever new way for people to give to charity, that can save donors from losing 40% or more of their donations to their charity.

He’s set up a non-profit, called **invest2donate** to get the message out there and we think it’s a great idea that some of our clients would like to know about...especially if they are frustrated by the endless phone calls, emails and letters they receive asking for donations. Is this of interest? If so, I can briefly fill you in on it.

*(if yes, continue. If no, give them the Giving Guide in case they change their mind later.)*

### **EXPLAIN THE PROBLEM**

1. The problem is that 60% of Donors give SPONTANEOUSLY, that is, they wait until they are asked. And because it’s the most common way to give, charities just keep asking and asking. DONORS ARE BOMBARDED with cold-call requests by phone, emails, letters and, of course, in the street. So **FRUSTRATING**, it can drive people away from donating altogether. A recent Sydney Morning Herald, article reports 400,000 less taxpaying donors than 6 years ago.
2. And it’s the MOST EXPENSIVE WAY TO FUNDRAISE. The cost of just ASKING averages 40%of the donations\*. 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.  
What’s worse, most donors not only give spontaneously, but they give **ONE-OFF**... so these costs of asking are continually repeated.

According to research undertaken by the ACCC, if a donor gives \$20/mth when asked in the street, somewhere between 8 to 17 months’ worth is paid **upfront** by the charity to the commercial fundraising company that runs the campaign. That means for the first 8 to 17 months all of that donor’s money effectively pays the fundraising company NOT the charity.

3. Finally, there are over 55,000 registered charities all contesting for limited donations. So selecting good charities is **CONFUSING**.

### **THE SOLUTION:**

**invest2donate** has developed a simple **DONATION PLANNER TOOL** that makes it easy for donors to **plan ahead** (saving the cost of asking), and **setup regular giving** (saving the costs of continually re-asking). If donors need help selecting a good charity, it even helps with that too. This kind of giving is called **Flexible Planned Giving**.

### **SHOW THE CLIENT HOW TO FIND & USE THE DONATION PLANNER TOOL**

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

Step 1 ...Step 2...Step3 ... *(questions are answered in the FAQs tab, including the most obvious...Q: who pays for 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. Either way give them The Giving Guide...)*

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

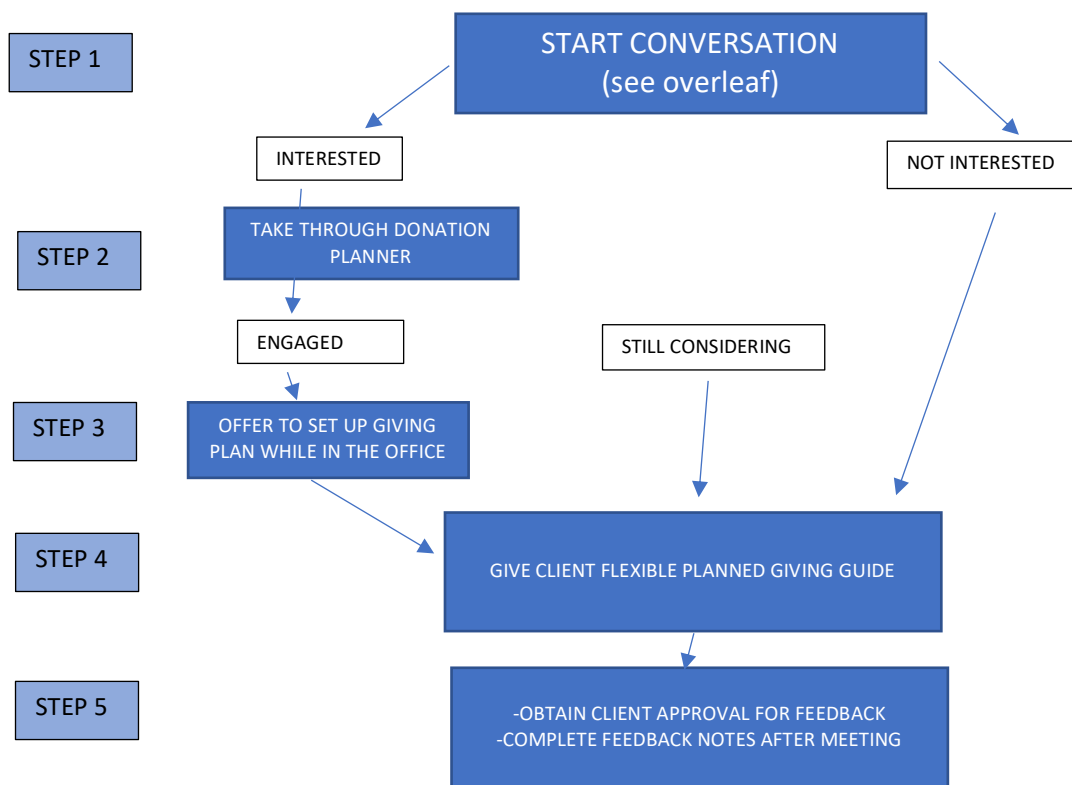
### **FEEDBACK PERMISSION:**

*(Seek client approval to be called, say in a week, by your assistant for anonymous and brief feedback. 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 adviser feedback via monthly phone call.*

- “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.

\*According to the PFRA, an industry body that self-regulates the fundraising companies and major charities that retain them

## 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** IMPLEMENTING AT HOME