

# Want To Boost Your Estate Planning Gifts? Wording is Important!

November 17, 2018

Professor Russell James from Texas Tech (a great resource for planned giving information) cites a study that was done regarding requests for charitable gifts in estate plans.

Professor James refers to a study in which professional advisors asked their clients if they would like to include a charitable bequest in their estate plans. As it turns out, the wording of the request resulted in a significantly different response rate.

When a professional advisor did not ask their client about making a charitable gift, around 5.0% of clients included a charitable bequest in their planning.

By being more intentional — by asking “Would you like to leave a charitable gift?” — The response rate *more than doubled*, to 10.4%

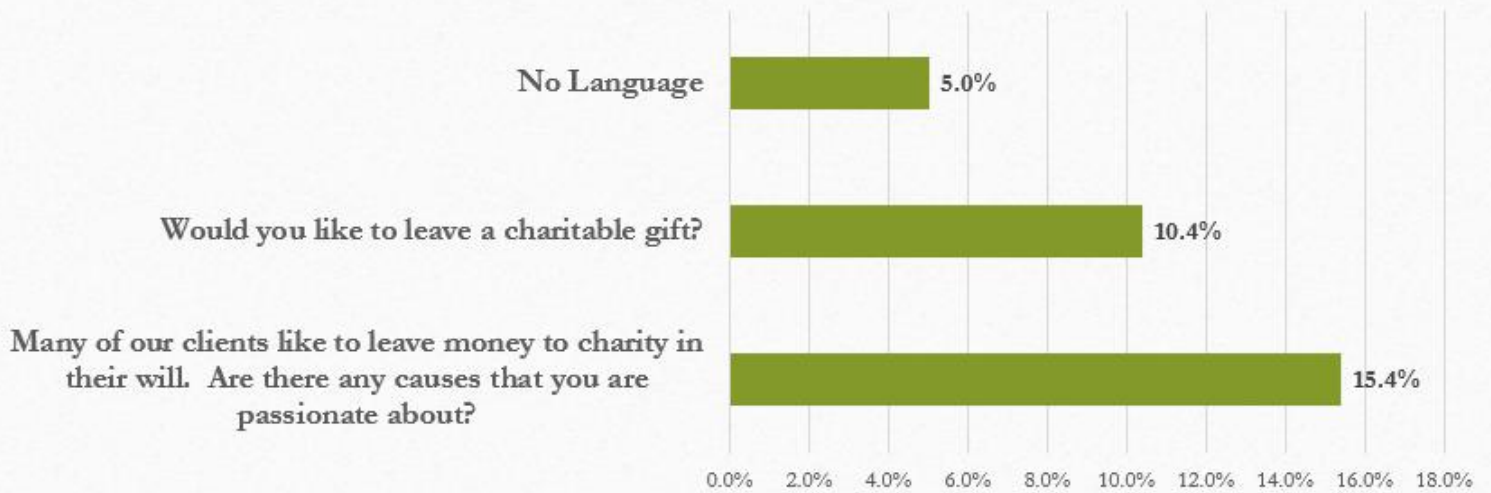
More creative wording led to an even higher response rate. When the professional advisor said, “Many of our clients like to leave money to charity in their will. Are there any causes that you are passionate about?”, the response rate jumped to 15.4% — *more than three times the response rate when no question was asked*.

Note that the wording makes two connections. First, it indicates that “many clients” do the same thing. Second, it puts the focus on “causes that **you** are passionate about”. Planting those two seeds tripled the response rate.

The lesson here? Thoughtful wording when asking for a charitable bequest can increase the number of estate gifts that you will receive in the future.

# Wording is Important!

---



Content provided by the Community Foundation Research & Training Institute