



LEAVE A LEGACY™ Stories and Stats – March 2010

This month we are sharing a donor stewardship story submitted by CAGP-ACPD™ member, Peter Chipman, CFRE, Director of Planned Giving and Major Gifts, Variety – The Children’s Charity of B.C.

Marjorie’s Success Beyond her Lifetime

Almost 10 years ago when I started with my charity in a professional capacity, I made my first ‘donor stewardship’ call to a woman who had donated \$150, her usual annual donation. I called her just to say ‘thank you’ and introduce myself. Well, that was the beginning of a wonderful relationship.

On the phone she told me something like “that’s so nice of you to do that. No one has ever called me to say thank you before. What a nice surprise. What did you say your name was again?” I also sent her a Christmas card that year.

The following year she donated over \$1,000 and of course I promptly called her to say thank you again. At this donor level she would also receive an appreciation certificate so I arranged for a visit with her, out in the Fraser valley. I learned she was single, no children and retired, loved children and had watched our telethon forever, didn’t like all the mail we sent her and once a year would be quite enough, thank you very much!

During our meeting I wondered out loud if she had ever considered leaving a gift in her Will to some of her favourite charities (hopefully including us). She said “Don’t you worry Mr. Chipman I’ve gone to my notary and have left a little something in my Will to three of my favourite charities, including yours.”

Each year thereafter she returned to her annual gift amount of \$150 and each year I called to thank her and made one more call just to say hello and let her know how we were doing in our mission. I sent a Christmas card every year too.

Last year my Christmas card was returned and her telephone was out of service. Oh! oh! And shortly after I received a call from the executor who sent the usual probate documents and copy of her Will. I was sad that I would no longer be able to share our conversations about helping children but sure enough there were 3 charities in her Will, 2 small specific legacies and a residual bequest for everything else. That was us!

Most grateful and delighted we were when we received a cheque for over \$700,000, so I could only think back to our first conversation where she said “No one has ever called me to say thank you before. What a nice surprise.” And she is helping so many children with that bequest, even beyond her lifetime.

Send in your donor stories today! If you have a donor story to share and would like to see it posted in the News section of the LEAVE A LEGACY™ website or an upcoming Stories and Stats, please contact Jennifer Paradis, National LEAVE A LEGACY™ coordinator by email – leavealegacy@cagp-acdp.org, or by phone, 1-888-430-9494 ext. 3.