The purpose of these talking points is to provide some guidance for conversation with classmates about 50th reunion giving. Unlike Alumni Annual Fund calls, 50th reunion giving calls will take more time and ultimately more conversations over more than one call or email.

Each classmate will take a different approach to processing their own 50th reunion gift. Your conversation might spur a need to revisit a will provision that is outdated or to consider using an appreciated asset to make a larger gift than they might have considered previously. In other words, 50th reunion giving takes time and your role is to help guide classmates to a gift decision that feels really good for them.

Thus, you might stage your calls:

**First call:** General greeting and getting reacquainted. Let them know when reunion is happening and that you are on the gift committee and will be contacting them again to share the many ways to give in the 50th year and to talk again.

**Second call:** Share an update from campus, or the reunion planning process. Let them know you are calling to share the many ways of giving in the 50th and share a story or two about yourself or a classmate who are making a special gift of cash and a deferred gift and how both count in the 50th gift total. Ask when would be a good time to follow-up and talk again after they have had time to consider how they might give.

**Third call:** Follow-up to learn what your classmate might be thinking for their own 50th reunion gift. Are there questions they have you can answer? Would they like to be in touch with a Carleton staff person? Can you send them a pledge form to fill out their gift intentions?

**Fourth calls and beyond:** Check-in to see where your classmate is at in the planning process. What’s the timeline for making a decision? When they would like you to be in touch again?

Before you begin your calls, visit the 50th reunion portal: [https://apps.carleton.edu/alumni/volunteer/50th/](https://apps.carleton.edu/alumni/volunteer/50th/)

There you will find information about past giving, if they are a Heywood member, and any outreach caller information that has been documented and shared.
TALKING POINTS

(Please note – you probably won’t use all of these talking points in one conversation, and you will probably cover various aspects of the gift conversation over many separate conversations.)

Getting to know your classmates again:

- Hi, <insert name of classmate>. This is <insert your name> from Carleton Class of 1967. You may have recently heard from <insert outreach caller name>. I’m also on the reunion committee and wanted to get in touch with you to talk about our upcoming reunion and hear if you have any input to share. It’s been a long time since we’ve connected.

- It has been fun to re-connect with classmates on the Reunion Planning Committee. We’re discovering that we are more interesting now than we were “then.” We are realizing what a difference Carleton has made in our lives.

- When was the last time you were back on campus?

- Are you planning to attend our 50th reunion? It will be June 15-18, 2017 in Northfield.

- We would love to hear any ideas you may have about the reunion.

- Tell me about your current activities…

Transitioning the conversation:

- I’m calling today because I serve on our 50th reunion gift committee. You have been so generous to Carleton through the years. Thank you for helping keep our alma mater strong.

- I wanted to tell you about 50th reunion giving and how it’s different. There are many ways to give during the 50th year. Did you know that in addition to cash gifts, will provisions and IRA beneficiary designations also count?

- Many of our classmates are thinking differently about giving as we approach our 50th year… have you?

Asking for cash/stock gifts:

Here are some various ways in which you could ask for an increased gift.

- In honor of our 50th reunion would you consider making a stretch cash gift?

- We have classmates giving X, Y & Z ranges. Where do you see yourself?

- Would you consider making a gift (pledging $X) each year for the next 4-5 years that could directly support our class gift?

- Would you consider making a gift (pledging $X) over the next four years?

- Would you consider making an increased gift (of $X)?

- Some classmates are choosing to use appreciated assets, such as stock, to make their 50th reunion gift. This option allows them some tax benefits and to make a bigger gift than otherwise possible. Have you considered using stock for your 50th gift?

Next Step: Wonderful, I will send you a pledge form that you can return to Carleton with your gift intention. (You can also tell them that Jennifer or Mari will be in contact with them to provide the pledge form and answer any questions.)
Asking for Heywood Gifts & Common Concerns/Objections:

- Have you heard about the Heywood Society? ANYONE can join.

- You’ve been such a generous donor to Carleton for so many years, and this <increased/stretch> cash gift you’re making is also wonderful ….have you ever considered including Carleton in your will?

- Have you ever wondered how that number gets so big on stage during reunion convocation? Did you know that deferred gifts – gifts you plan today, but arrive at your death – also count in our 50th reunion total? Would you consider including Carleton in your estate plans?

Here is a sampling of some common responses when asking for a deferred gift:

- **Yes, in fact, Carleton is already in the will, (but we didn’t know):**
  That’s terrific! Have you told Carleton? Did you know that if you share this information with the College, we can recognize a conservative estimate of the value of your gift as part of our 50th reunion gift?

  **Next step:** Follow-up by sending the Estate Commitment Form.

- **Yes, but I need to provide for my children and grandchildren first:**
  Of course. Many of us are in the same position. Some of our classmates have decided to name Carleton a beneficiary of a retirement account for a small percentage. This allows them to give the majority of their estate to their heirs first and leaves something for the College.

  **Next step:** Suggest they contact their plan administrator for a beneficiary designation form. Put them in touch with Jennifer Foth or Mari Aylin on staff.

- **I don’t have a will:**
  You’re not alone. Many of our classmates are at the same stage in their estate planning. Did you know you could still participate in the Heywood Society by naming Carleton a beneficiary of a retirement account (403b) or IRA?

  **Next step:** Would it be OK if I put you in touch with Jennifer Foth or Mari Aylin on staff at Carleton and they can help you plan your gift?

- **I’m worried about running out of income, there won’t be anything left:**
  What if there was a way for you to make a gift to Carleton that paid you income?

  There are ways to plan a gift that pays you (and your spouse) income for the rest of your life, and at your death whatever is left goes to Carleton.

  **Next step:** Put them in touch with Jennifer Foth or Mari Aylin on staff.

- **I am considering including Carleton in my plans:**
  Thank you. Would you like me to send you some information?

  Would it be OK if I put you in touch with Jennifer Foth or Mari Aylin on staff to answer any questions?
Closing the conversation:

Great to talk with you! All of the information I’ve shared is a lot to consider and I expect you will need some time to think it over. I will be back in touch in a few weeks. When would be a good time for me to call back?

Following up:

- Hello again….

- It was a pleasure to begin reconnecting with you a few weeks ago when we talked by phone. In the short time since we last connected, even more developments have occurred for our 50th reunion that I wanted to make sure you were aware of:

  Insert interesting new development

- I’m also hoping we can touch base on your thoughts around your 50th reunion gift. Have you (and your spouse) had a chance to discuss some of the options? What are you thinking?

Responding to objections:

- I haven’t had time to consider it….

  Can I help? When would be a good time for me to check back in?

- I’m just going to do what I’ve always done.

  We’re very grateful for your continued support. Did you know that you could help us reach our goal of X if you increased your annual gift by X?