



*Forever*

## Canvasser's Card

### Before the Meeting...

- Remember why you are here! Quality health care is a priority for everyone - now and in the future.
- Familiarize yourself with "Mount Sinai Hospital - Facts at a Glance" in your Canvasser Manual.
- Review profile on your prospect.

### During the Meeting...

**Planned Giving Presentation** - Keep the message simple. Explain what planned giving is and why it is important to MSH. Emphasize the people whom the gift will help. Now may be a good time to tell the donor about your own planned gift. Share as many details as you are comfortable.

**Listen and Learn** - The best canvassers are good listeners. Encourage your prospect to talk. Identify the prospects needs, and understand those needs so that you can suggest appropriate planned giving vehicles.

**Ask for the Gift** - Be direct - ask them to consider a specific type of planned gift and an amount. After you have asked for the gift, don't talk. Be patient. Give your prospect time to think about your request.

**Thank them** - Whether your prospect has decided to make a planned gift or not, thank them for their time. Be sure that you are both clear on what you agreed on at the end of the meeting (ie. planned gift, second meeting, or leaving behind some material to be discussed at a later date).

#### Need some help?

If you have questions or require specific information for your prospect (including gift illustrations), contact Mount Sinai Hospital Foundation at 416-586-8203.

### **I have a family & I'm not really a candidate.**

Agree with the prospect that family needs come first. Ask if once those needs have been taken care of, would they consider a gift to Mount Sinai. The institutions that support our families also need to be considered.

### **What can I do if I would like to leave money to Mount Sinai, but want to make sure that my family is looked after first?**

Suggest some vehicles for consideration:

- By purchasing a life insurance policy and naming Mount Sinai Hospital Foundation of Toronto as owner and beneficiary, they are not reducing the estate for their family members.
- It is possible to set up a trust in which the individual's family would receive money during his or her lifetimes and the remainder, or any portion he/she wishes, may be given to the Mount Sinai upon the family members' deaths.

### **I don't have any extra money.**

Most planned gifts are deferred and are based on one's total assets rather than on current disposable income. They do not necessarily require any present outlay of cash.

### **I give my time as a volunteer & I don't feel I have to give money too.**

Thank the prospect. Without his/her time, Mount Sinai would certainly miss his/her contribution. But, if we cannot ask him/her for a gift, a committed supporter, then how can we go to someone less committed and expect them to give Mount Sinai a gift. We need both their time and financial support.

### **I would like to designate my gift.**

Undesignated future gifts help the Hospital because they allow the Hospital the flexibility to spend the gift on the area of most urgent need at that time. If they wish to designate their gift, explain that they should advise Foundation staff to ensure that the wording reflects their gift intention.

### **What recognition will I get?**

All donors who make planned gifts will be invited to become a member of *Friends for the Future (FFF)*. They will also receive Hospital publications, be invited to FFF events and will be recognized in Foundation publications. Donors making planned gifts of \$10,000 or more will be invited to place their names on the *Friends for the Future* Plaque. When a realized planned gift is \$100,000 or more, the donor's estate will also be offered a star on the Donor Star Wall.