

LifeHelp
Legacy Life
Non-profit Letter to Mid-Level Donors – Template
#5 5-10-12

(Purpose: Pre-written copy for mid-level donor direct mail, cover letter to enclosed Legacy Life one-pager. May be used in its entirety, or customized by the non-profit.)

Dear [NAME]:

As a historically generous donor, you may have given some thought to adding a bequest to [ORGANIZATION] into your will. If so, we'd like to tell you about a new program that's far better than a bequest – both for you and for us. It's called Legacy Life and it greatly magnifies the impact of whatever amount you choose to give, as shown in the examples on the enclosed summary.

In addition to enabling you to *gift* more without *donating* more:

- This program offers you significant tax advantages not available with a bequest.
- Unlike a cash bequest, funds are not taken away from your estate or your heirs' inheritance upon death.
- Compared to a bequest, it's simpler, easier and less expensive for you. This program can be set up without attorneys, CPAs or complex estate planning.

There's simply no down side.

I encourage you to consider this way to optimize your already generous and much-appreciated donations to [ORGANIZATION].

For answers to any questions about the program, and a no-obligation look at your options, please call the Legacy Life program administrator toll-free, at 1-877-243-9988, 7 a.m. to 6 p.m. Pacific Time.

As always, our sincere thanks for your friendship and support.

[SIG]

[NAME
[ORGANIZATION]
[CONTACT INFO]