Recognize, Educate, Invite
The Role of the Advisor/Teacher in Helping Clients Become Engaged in Charitable Planning

I. THE ADVISOR AS TEACHER - Elder M. Russell Ballard taught us last year: “[Advisors], one other thing you must be is good teachers. You have to be teachers that can teach the principals of giving as a principal of the gospel of Jesus Christ.”

II. WHAT WE THINK/WHAT OUR CLIENTS THINK

a. According to a 2013 U.S. Trust Study:
   i. Advisors believe they are initiating conversations about charitable giving.
   ii. Advisors believe their conversations are equally balanced between the Client’s personal goals/interests and technical topics.
   iii. Clients believe that the advisor does not bring it up and if they do the focus is on the technical and not the personal.

III. MISSION OF GIFT PLANNING COUNCIL - “Help professional advisors RECOGNIZE charitable planning EDUCATE advisors about gift planning techniques and the charitable priorities of The Church of Jesus Christ of Latter-day Saints INVITE advisors to involve LDS Philanthropies Gift Planning Services if their clients are inclined to include the Church’s charitable priorities in their planning.

IV. RECOGNIZE – EDUCATE – INVITE

a. We fill the role of the advisor/teacher in the same way.
   i. RECOGNIZE. We recognize our Clients interests and resources. We recognize opportunities to discuss charitable planning.
   ii. EDUCATE. We educate our Clients on the opportunities and benefits available to them in charitable giving.
   iii. INVITE. We invite our Clients to make charitable giving part of their planning.

b. In order to Recognize, Educate, and Invite we must do a few things in preparation:
   i. We need to be prayerful in our preparation.
   ii. We need to seek the power of the Holy Ghost.
   iii. We need to create a learning environment.
   iv. Elder Ballard:

1. “I would think that prayer would be one of those things that you would enter into, prior to the presentation or the meeting with anyone that you are hoping to influence to make a good decision with their resources. I think when one does that the power of the Holy Ghost comes and it’s an amazing thing to me how the Holy Ghost can teach you all things and bring back your remembrance whatsoever the Lord
has said unto you right at the moment you need it, and it seems like it
works so much better for me when I pray for it, when I ask for it and
seek that guidance.”

2. You need to think in terms of how you set the environment for some of
these discussions that you have, it’s pretty hard, . . . but you can’t have
the television going on in the other room and a lot of activity going on in
the other room when you’re trying to do something as significant as the
work you’re doing, say for example, in the living room. So that’s why
families need to be brought together and focused and it’s one of our
jobs to do that.”

V. **RECOGNIZE**

a. In your intake questionnaire and subsequent meetings ask questions that will allow you
to discover:
   i. What organizations your Clients affiliate with or belong to.
   ii. What service projects your Clients participate in.
   iii. What your Clients already give their time, talents, or resources to.
   iv. What school your Client attended.
   v. What your Client’s occupation is.

b. The goal is to figure out what your Client is passionate about.

c. Loyalty to a cause or institution is possibly the best predictor of willingness to make a
gift.

d. Ask inspired questions.

e. “The Savior asked questions that invited learners to think and feel deeply about the
truths He taught. Our questions can similarly inspire learners to ponder gospel truths
and find ways to apply them in their lives.” – *Teaching in the Savior’s Way*

VI. **EDUCATE**

a. Don’t tell them what to do, but help them to see what opportunities may exist for them
to demonstrate their passion and loyalty through planned giving.

b. Help them see the benefit to themselves and others when they give.

c. Help your Clients understand “the principals of giving as a principal of the gospel of
Jesus Christ.”

d. Examples

VII. **INVITE**

a. “The Savior taught in order to change lives. He wanted His disciples to do more than just
hear His words, so He invited them to act on His teachings with faith.” -*Teaching in the
Saviors Way*
b. We are teaching “the principals of giving as a principal of the gospel of Jesus Christ.”
c. Invite your client to act on this principal.
d. Invite them to act in the way they feel inspired.
e. Follow-up
f. Be patient

VIII. THE ADVISOR AS THE TEACHER - “CPAs and attorneys and financial planners need to . . . help families stay focused as to what really matters, what’s important. If we keep the eternal perspective in what you’re doing and if we can get families to keep the eternal perspective in their lives then it’s easier to see the value of resources being used to help the hungry and the poor and other worthy causes.” - Elder M. Russell Ballard