

SEPTEMBER 15 & 16 • ORLANDO, FLORIDA

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**CCGC** CRESCENDO CREATIVE GIFT CONFERENCE

**Crescendo**

# Leading with Legacy: Bridging Today's Giving with Tomorrow's Impact

Marcy Heim and Niki Chopra Richardson

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**CCGC** CRESCENDO CREATIVE GIFT CONFERENCE

## Leading with Legacy: Bridging Today's Giving with Tomorrow's Impact



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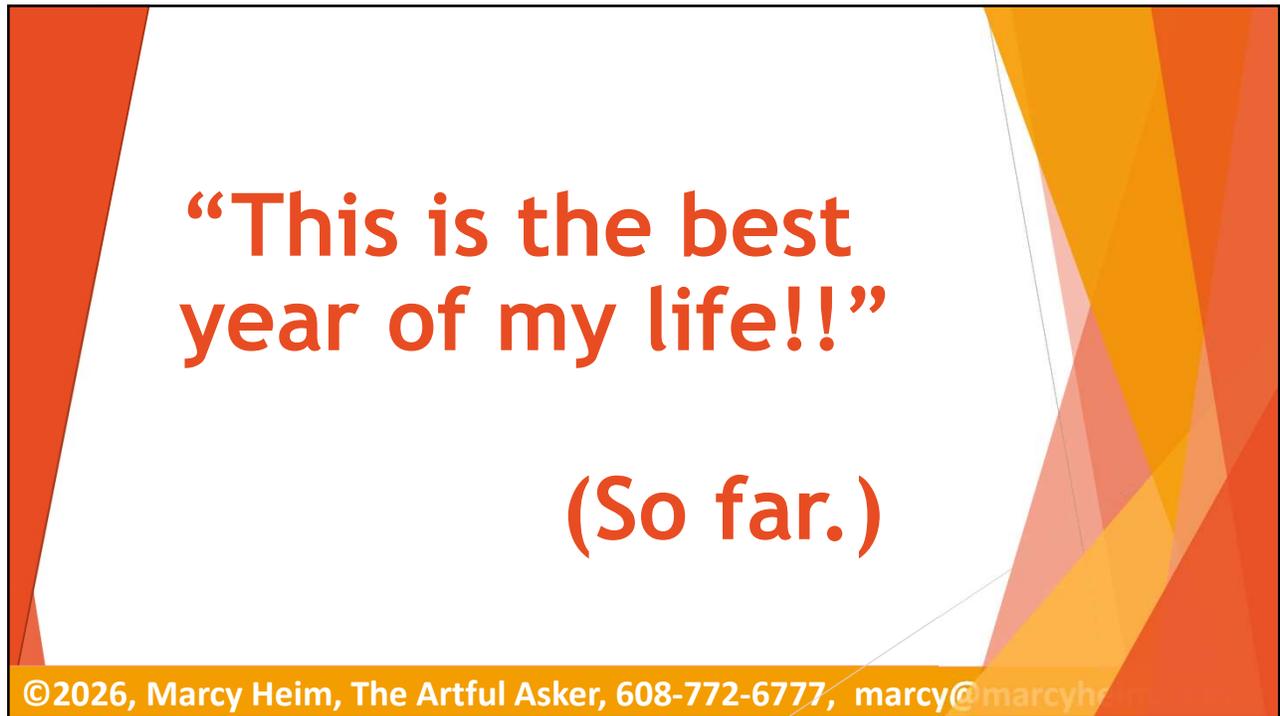


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## Session Goal---

Small cash - annual fund →

Larger cash - major gifts →

Beyond cash - transformational gifts

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## Our Agenda - Leading with Legacy

- ▶ It's all in your head
- ▶ Vibrant Options for Giving
- ▶ Creating Authentic Relationships
- ▶ Asking for Anything Artfully
- ▶ Love Letters
- ▶ Words of Wisdom

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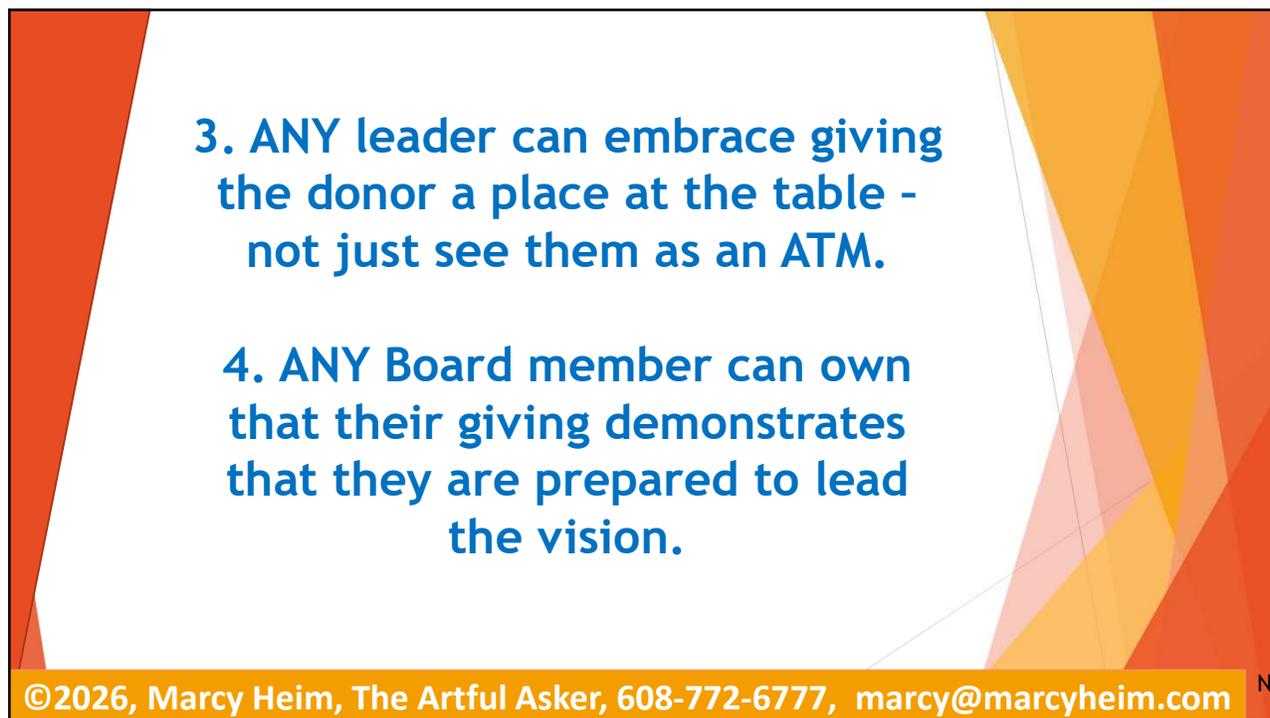


**Let's START with the TAKEAWAYS!**

- 1. ANY NFP can inspire transformational giving.**
- 2. ANY fundraiser can make the decision to focus more time on major/legacy gift relationships.**

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- 3. ANY leader can embrace giving the donor a place at the table - not just see them as an ATM.**
- 4. ANY Board member can own that their giving demonstrates that they are prepared to lead the vision.**

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**ANYONE can do  
the math.  
Major gifts and Legacy  
gifts are game changers.  
Repeatable and  
Scalable!**

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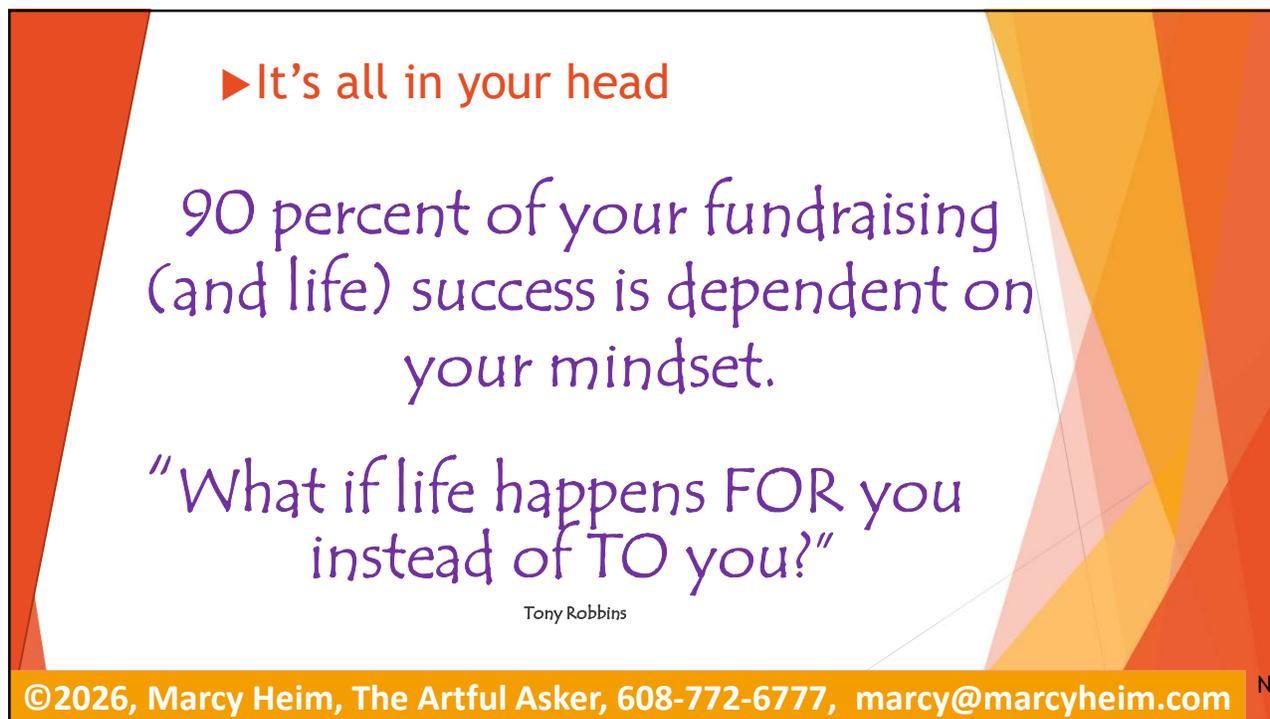
► It's all in your head

90 percent of your fundraising  
(and life) success is dependent on  
your mindset.

"What if life happens FOR you  
instead of TO you?"

Tony Robbins

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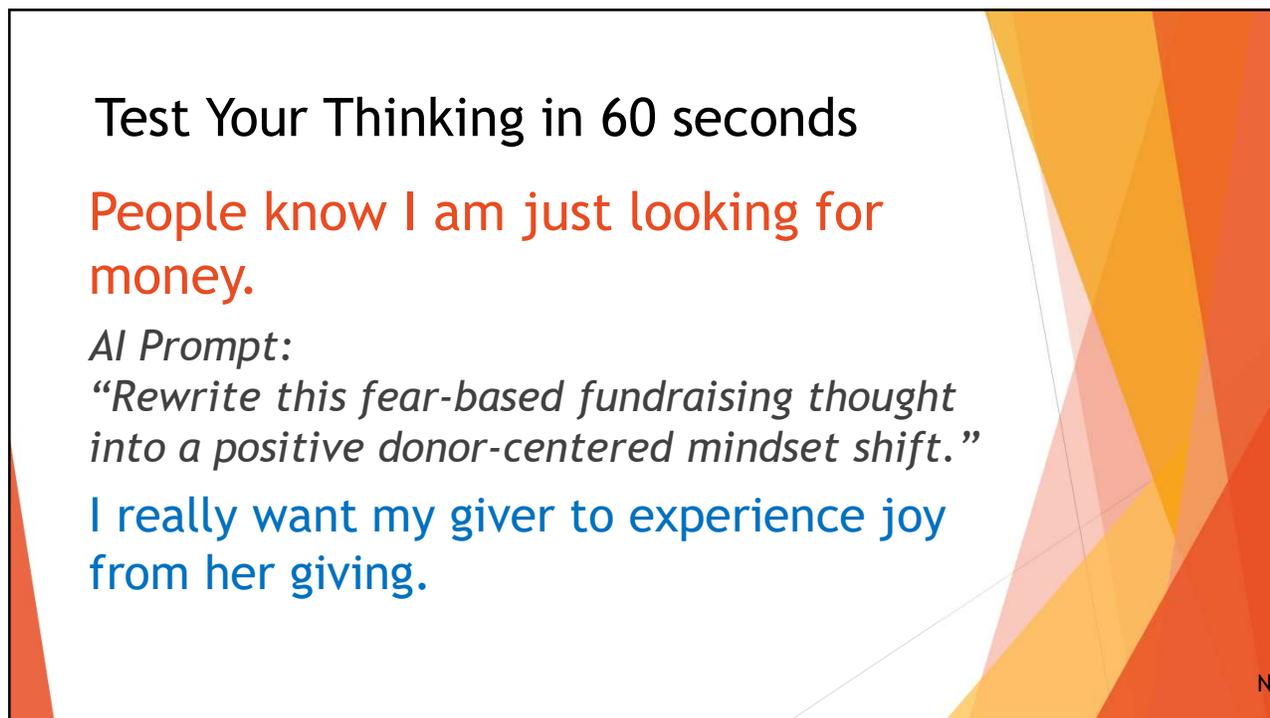
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Test Your Thinking in 60 seconds

People know I am just looking for  
money.

*AI Prompt:*  
"Rewrite this fear-based fundraising thought  
into a positive donor-centered mindset shift."

I really want my giver to experience joy  
from her giving.



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## Test Your Thinking in 60 seconds

I sent them an email, and they didn't respond. Why can't people answer my email? Why don't they call back?

*AI Prompt:*

*"Rewrite this fear-based fundraising thought into a positive donor-centered mindset shift."*

How can I make it easier for them to get in touch?

N

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## Test Your Thinking in 60 seconds

People will zone out if I start talking about complex gifts.

*AI Prompt:*

*"Rewrite this fear-based fundraising thought into a positive donor-centered mindset shift."*

If I focus on what the gift will do - legacy, benefit kids, leave a mark, let you give more - and take the "how" in steps; they will listen.

N

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## Test Your Thinking in 60 seconds

Either you can be rich or you can be liked,  
kind, spiritual....

*AI Prompt:*

*“Rewrite this fear-based fundraising thought  
into a positive donor-centered mindset shift.”*

You can be rich AND liked, kind and  
spiritual. It’s not the money.

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Let’s sing!

**People love to Give me Money  
To Make a Difference  
People love to Give me Money  
I’m the link, to their  
investment**



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## Write YOUR Reframe

“It will be so much harder to raise money  
this year.”

Money comes to me easily and  
frequently.

Start with...

This year it's going to be hard  
to....And reframe it!

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“If you change the way  
you look at things... the  
things you look at  
change. ...

Wayne Dyre

Renee Thompson, “Every time I’m talking to a donor, I’m  
helping them realize they have permission to give what  
brings them joy.”

Your internal dialogue determines your external results.  
If AI can help you clean that up - USE IT!

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“It’s not about the money, it’s about what the money does...Really does.”

Marcy Heim

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For TOArts  
What The Money  
Does....  
What The Money  
REALLY Does.....

We need to be CLEAR on BOTH.

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Plan - Options - Vision

Strategic Plan

Our AMAZING FUTURE!

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**Review - Options - A Better Today**

Operations Budget            **Our BEST Impact NOW!**



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**CREATE 3-5 Overarching "Buckets"**

**ALL your Options for Giving**



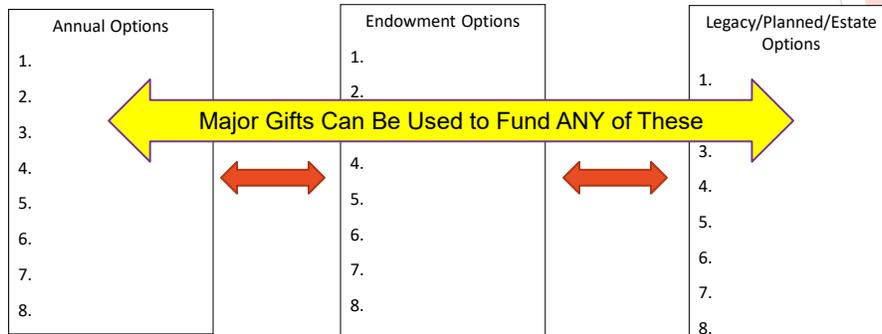
- Recipients of Service - Clients, residents, trees, animals
- Facilities & Infrastructure
- Staff Support
- Specific Programs
- Where the need is greatest

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# Lifetime Options of Giving

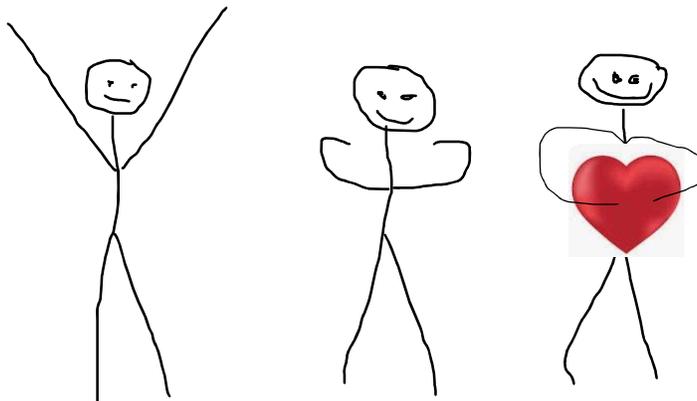
Dedicated work is needed to prioritize options for giving and create clear pathways for donors to invest initially and throughout their lifetime with you.



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Sharing Vibrant Options for Giving will help  
your giver share what is in their heart.



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### Vibrant Options for Giving

Gift Amount	Giving Options	Description of Giving Option	Giving Area
\$1,000,000.00	Arts Odyssey	Supporting the arts education journey of students from First Five to First Job;	Access
\$250,000.00	Olson Grants	Subsidizing the rent of BAPAC stages for nonprofit arts groups	Access
\$130,000.00	Stagecoach After Dark Series - 4 shows		Access
\$113,500.00	Arts Invention Fund	5% of this fund to be used every year to support new arts-related requests from the community	Access
\$8,000	Kids and the Arts	Program coordination for 1 show	Education
\$3,250	Adopt a YALA student	Adopt one student to go through year-long workforce development program to learn basic life skills and be exposed to different careers in the arts	Education

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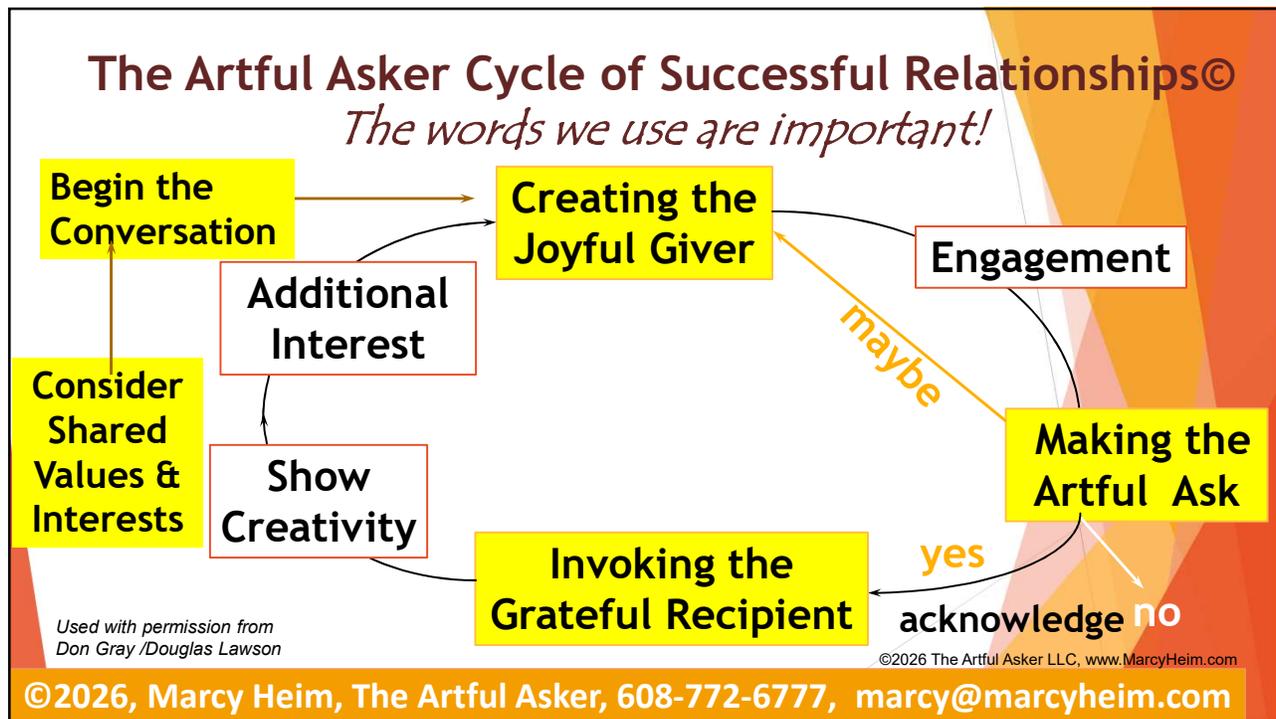
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- ▶ **Creating Authentic Relationships**
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## Conversation topics - Part 1

- ▶ How do you think our programs are viewed in the community?
- ▶ Do you feel gifts to us make a difference for (mission?)
- ▶ What do you enjoy most about being part of our giver family?
- ▶ Do you have some advice on what we should focus on more or less?

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## Conversation topics - Part 2

- ▶ Share a gift that brought you joy. Why?
- ▶ Have you given any thought to how you want to be remembered? How would your obit read?
- ▶ Have you ever given a gift with something other than cash?
- ▶ How do you feel about money and wealth?
- ▶ What have you heard about the extra benefits from giving assets instead of cash? Or DAFs? Or a minimum required distribution from an IRA?

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## Blend your conversations with education

- ▶ Crescendo partner website.
- ▶ Newer fundraisers can easily manage the newsletters and communications.
- ▶ You don't have to know it all.
- ▶ Best messages for specific audiences.
- ▶ Touches blend your mission with smarter giving options.

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## Donor Journeys -HOW do we do this?

- ▶ Begin with a Chart of Gifts - campaign, annual fund, specific project.
- ▶ Partner (message) vibrant giving options with giving levels.
- ▶ Match prospective givers with the giving options. (Best guess)
- ▶ Weave in different assets to create more opportunity for your donor to enjoy their wealth.
- ▶ Create authentic experiences, conversations, and connections with the long-term goal of presenting a love letter that leads to both current and planned giving.
- ▶ ASK all along the way.

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**Marcy's 3-Sentence Ask©**

Name \_\_\_\_\_

**You have (Why ME?)**  
*(compliment, service, giving)*

**You understand (Why THIS?)**  
*(special connection to this request)*

**Would you consider a gift of \_\_\_\_ (What?)  
for/to\_\_\_\_\_ . THEN QUIET**

**Marcy's  
3-sentence  
Artful Ask  
17words  
max/sentence**

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**Beginning Ask**

“You have such a love for this theatre  
and the joy it brings.  
You understand how th arts can have  
a deep impact on the life of a teen.  
Would you consider visiting more  
about some options to enrich the  
experiences of our young people?  
*Niki Chopra Richardson*

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**Sponsor Ask**

“You have been a long-time member of our theatre family.

You understand how partnering with us could keep your business and logo in front of our audiences and be a real benefit.

Would you consider reviewing a letter to see ways you can become a partner ? (in kind)?”

*Niki Chopra Richardson*

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**Major Donor Continuing the Conversation Ask**

“You have expressed interest in our youth workforce development.

You understand the impact the arts can have on the life of young people who are passionate about the theatre.

Would you consider reviewing some giving options that provide both immediate support and legacy and then continuing this conversation?”

*Niki Chopra Richardson*

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## Marcy's 3-Sentence Ask©

Download Marcy's ASK WORKSHEET  
[www.marcyheim.com/askworksheet](http://www.marcyheim.com/askworksheet)

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## A Love Letter

- A relational “proposal”
- Matches the type of relationship you have with the person - sending a formal proposal shocks to a sales relationship and challenges trust.
- Must match the depth of your current relationship



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## A Love Letter is a relational “proposal”

- ▶ Always begins with “you.”
- ▶ Summarizes your 3 “best guesses” by combining conversation and giving options
- ▶ Combines outright and deferred giving combinations - at least at the top level
- ▶ Invites a conversation to see how this feels
- ▶ Is not a direct ask, but often leads to a gift
- ▶ Invites the giver to give the gift that is meaningful for them and brings them JOY!



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Dear Joan and Steve,

Your deep commitment to our mission and your generosity these past seven years demonstrates your deep commitment to fostering arts for all. Thank you for your investment in TOArts. It was such a pleasure to walk you around the theatre. Thank you, Steve, for your insightful questions. We are so glad you were able to see our Conservatory Program in action.

This program has been successful thanks to the generosity of investors like yourselves who understand the importance of the arts in our community for future generations.

Based on your expressed interest in supporting Creators Conservatory, we are thrilled to present investment opportunities that would ensure this program's sustainability. Creators Conservatory currently costs \$30,000 annually to operate, and your support could create a lasting endowment to fund this program in perpetuity.

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**Creators Conservatory Endowment Investment Opportunities**

- ▶ **The Joan and Steve Jones Creators Conservatory Endowment - \$1,000,000**  
This transformational investment would fully endow Creators Conservatory in perpetuity. We envision structuring this as a \$750,000 endowment fund that would generate \$30,000 annually at 4%—covering the complete annual operating costs of the program forever—paired with a \$250,000 planned gift to create additional program enhancements and ensure future growth and excellence.
- ▶ **The Jones Family Creators Conservatory Legacy - \$750,000** This investment would provide significant ongoing support through a \$600,000 endowment fund generating \$24,000 annually at 4%, covering 80% of The Creators Conservatory's annual operating costs—combined with a \$150,000 estate commitment to support future program expansion and enhancements.
- ▶ **The Joan and Steve Jones Creators Conservatory Foundation - \$500,000**  
This foundational investment would provide substantial ongoing support through a \$350,000 endowment fund generating \$14,000 annually at 4% covering nearly half of Creators Conservatory's annual operating costs—combined with a \$150,000 planned gift to support long-term program sustainability and growth.

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Given your personal philanthropy, it is evident that education and empowerment of youth are core values for you. Your investment will not only provide financial support but also establish you as champions of arts education in our community, with your \$32,950 in previous giving recognized as part of your total transformational investment.

Your investment will be key in TOArts' ability to provide high-quality programming. You understand better than most that oftentimes programs operate on bare bones. In a community like ours, with a facility like the Bank of America Performing Arts Center, we believe we have an obligation to go above minimum; to create programs of excellence.

#### The Investment Structure

Any of these investment levels can be structured to meet your philanthropic and financial planning needs:

- ▶ Immediate gifts can be made over 3-5 years toward our \$5M campaign goal
- ▶ Estate commitments can be structured through various planned giving vehicles
- ▶ Combined giving allows maximum flexibility and impact

Please know that this is the first draft, and with your feedback, we can make any adjustments.

We look forward to continuing this conversation and determining the most meaningful investment for your legacy.

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Dear Betty and Joe,

You both have poured so much love, commitment, and heart into Forest Lake Academy. Betty, you served this school faithfully for many years, as a faculty member, and as someone who helped strengthen nearly every area of campus life. You helped raise funds that blessed our students, supported Share the Dream, expanded athletics, strengthened music programs, and helped move FLA forward during seasons when your leadership made all the difference.

You both give back because you believe deeply in the mission of Adventist education. Your children are alumni, and your family's connection to FLA is woven into your story. Joe, your support has been steady and heartfelt. Betty, the work you did here continues to bless us every single day. Thank you for all you have done and for all you continue to do for Forest Lake Academy.

We are moving forward with the **Building for Tomorrow Campaign**. **At the same time, we are also Building for Today to ensure the needs of current students are met as we grow.** The three investment opportunities below we feel align beautifully with your story, your service, and your love for this school.

Dr. Baker and I ask you to prayerfully consider these - all of which can be completed over time, that not only reflect your family's history at FLA but also extends your legacy into the future.

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**1. The Jones Family Office of Advancement & Engagement Wing - \$250,000**

This opportunity is profoundly connected to your legacy at FLA, Betty. You led the Development Department with passion, vision, and unwavering dedication. Naming the Offices of Advancement and Engagement after your family would honor your years of service and the foundational work you did to strengthen fundraising, alumni relations, and donor engagement.

This wing will be the center of storytelling, philanthropy, alumni connection, and mission advancement—the very work you poured your heart into. It would recognize the seeds you planted and the legacy of generosity you helped shape.

**2. The Jones Family Endowment for Worthy Students - \$100,000**

Your family has always believed in giving students access to Adventist education—especially those who need financial support. Through Share the Dream and your own personal giving, you've helped countless young people receive an FLA education who would not have had that opportunity otherwise.

A Jones Family Endowment would permanently support worthy students year after year. This is a gift that grows, sustains, and blesses long beyond a single moment. It would reflect your lifelong belief in helping students find a home at FLA regardless of financial obstacles.

**3. The Jones Family Classroom - \$70,000**

A classroom named after your family would be a beautiful tribute to both Melissa's years of teaching and your shared commitment to Christian education. In this space, students will learn, pray, grow, and discover who God is calling them to be.

Every student who walks into the Keller Classroom will be surrounded by the same spirit of excellence, compassion, and faith that you both have modeled throughout your lives.

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Betty and Joe, your fingerprints are already woven into the history and heartbeat of Forest Lake Academy. This campaign is an opportunity to extend that legacy into the next generation of students whose lives will be shaped by this campus.

**Please consider continuing this conversation with Dr. Baker and me for an honest conversation about these opportunities and what might feel most meaningful for your family.** Of course, we also understand investments of this significance may need to be presented over a few years and we have funding in place to give you and other donors the timeline needed.

Look for a text with a few dates that are open in the next few weeks. We would be honored to hear your thoughts, listen to your hearts, and explore together how your legacy could be reflected in this next chapter of FLA.

With deep appreciation and warm regards,  
Heidi Salazar

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Dear Gina,

It has been a joy getting to know you over these past couple of years. I do so appreciate your love and warmth.

Our lunch last December was especially meaningful. The compassion and the size of your heart doesn't surprise me at all. Because YOU rallied the WW Club to donate books to now TWO school shows, the club's (YOUR) impact has been felt by over 3,000 students in some of the poorest areas of our County. I was in awe at how you graciously drove to over a dozen school sites from Santa Paula to Las Virgenes delivering the Grace for President books. You truly have a heart for these kids and their education.

At our lunch, you gave me permission to share giving options that support your passion for students, education, and scholarships. You expressed such enthusiasm over our Youth Arts Leadership programming both in the summer and the year-round program, that I felt these giving opportunities might feel meaningful to you.

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### The Opportunities

▶ **The Gina Sanchez Scholarship Endowment Fund - \$50,000**

At a conservative 4% (\$20,000), this will support one (1) **Sanchez Junior Fellow**: a student who would receive an annual \$20,000 scholarship in support of a 4-year degree in a creative economy field. *(Every 4 years, a new Sanchez Junior Fellow would be selected. Can you see the impact of what this might look like in the course of one generation? 30 years, 6-7 students well on their way to productive successful lives thanks to your investment in their education)*

▶ **The Gina Sanchez Artistic Talent Fund - \$25,000**

At a conservative 4% (\$10,000), this will be invested in the Kids and the Arts School Field Trip Program, supporting the artistic talent for one (1) field trip performance per year for schools from underserved communities in perpetuity. This creates a legacy of joy and hope as this experience becomes a tradition for these kids – something they can count on – The Sanchez Arts Field Trip!

▶ **Adopt a Youth Arts Leader Fund - \$12,500**

At a conservative 4% (\$6,500), this will support one (1) student's participation in the 10-month leadership program every year in perpetuity.

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Gina, you have been an educator for more than half your life and education and empowerment of youth are important core values for you. These scholarships will not only provide financial help but also foster your role as a mentor and friend to these students.

Whether or not you choose to do a named endowment, your investment will be key in TOArts' ability to provide high-quality programming. As you know, most programs must operate on bare bones. In a community like ours, with a facility like the Bank of America Performing Arts Center, we believe we have an obligation to go above minimum; to **create programs of excellence.**

#### **The Investment**

An investment of any of the above-mentioned gifts will be a separate fund named for you within the TOArts Endowment Fund. This investment can also be made over a period of 3-5 years.

Additionally, combinations of outright and legacy giving can be used to provide both immediate stability of the program and ensure its sustainability.

Please know that this is just a draft. I invite your feedback, along with that of your financial advisor, to adjust this until we determine the most meaningful investment for YOUR legacy for these kids.

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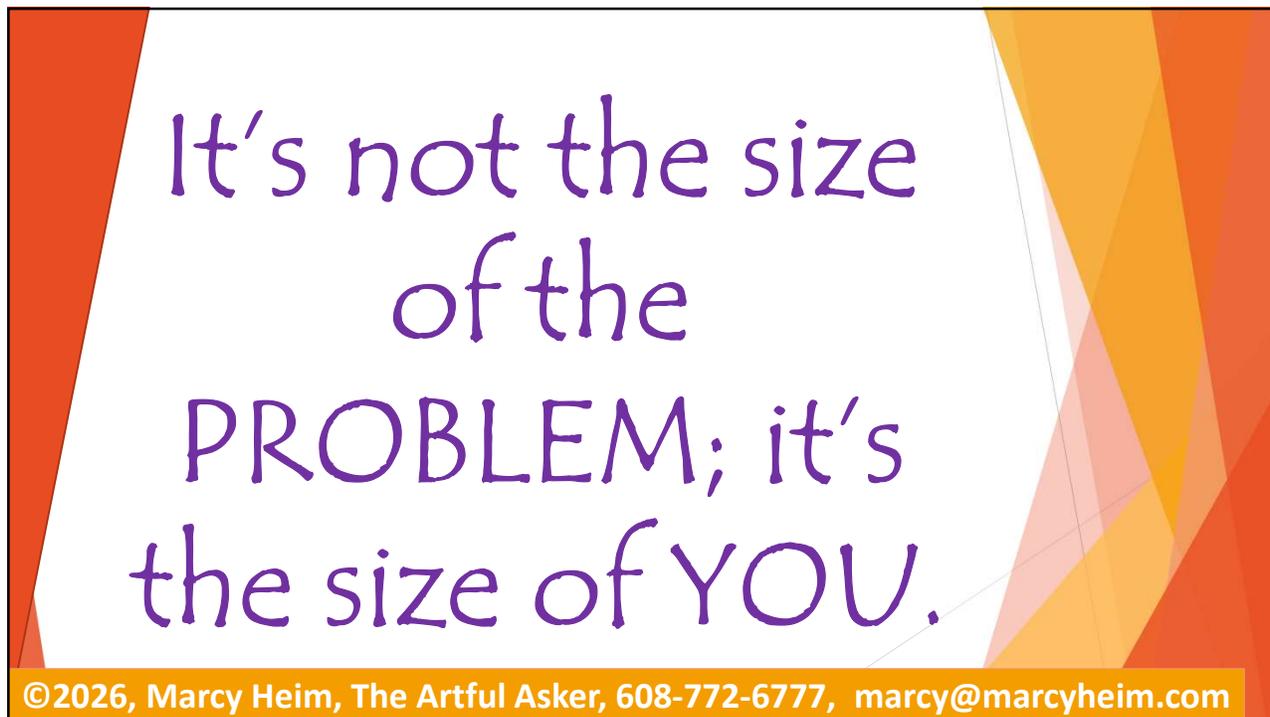
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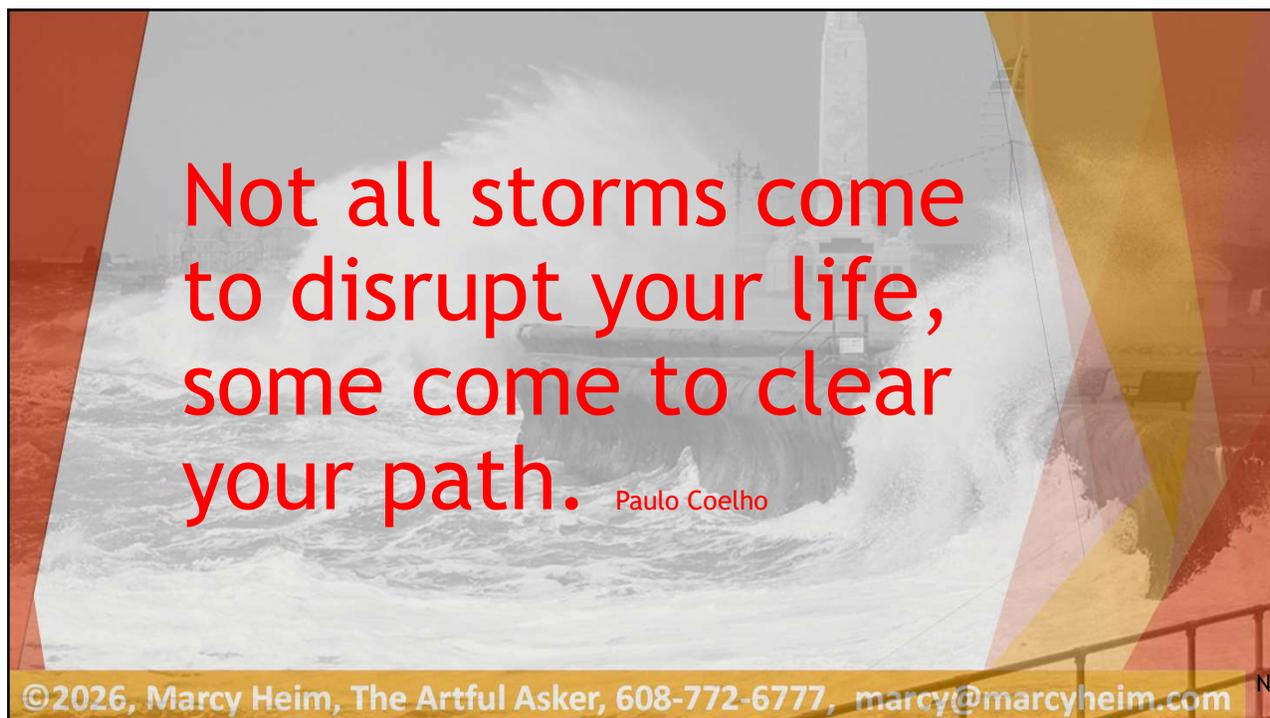
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Engage.... and  
engage ....and  
engage with your  
givers. Marcy Heim

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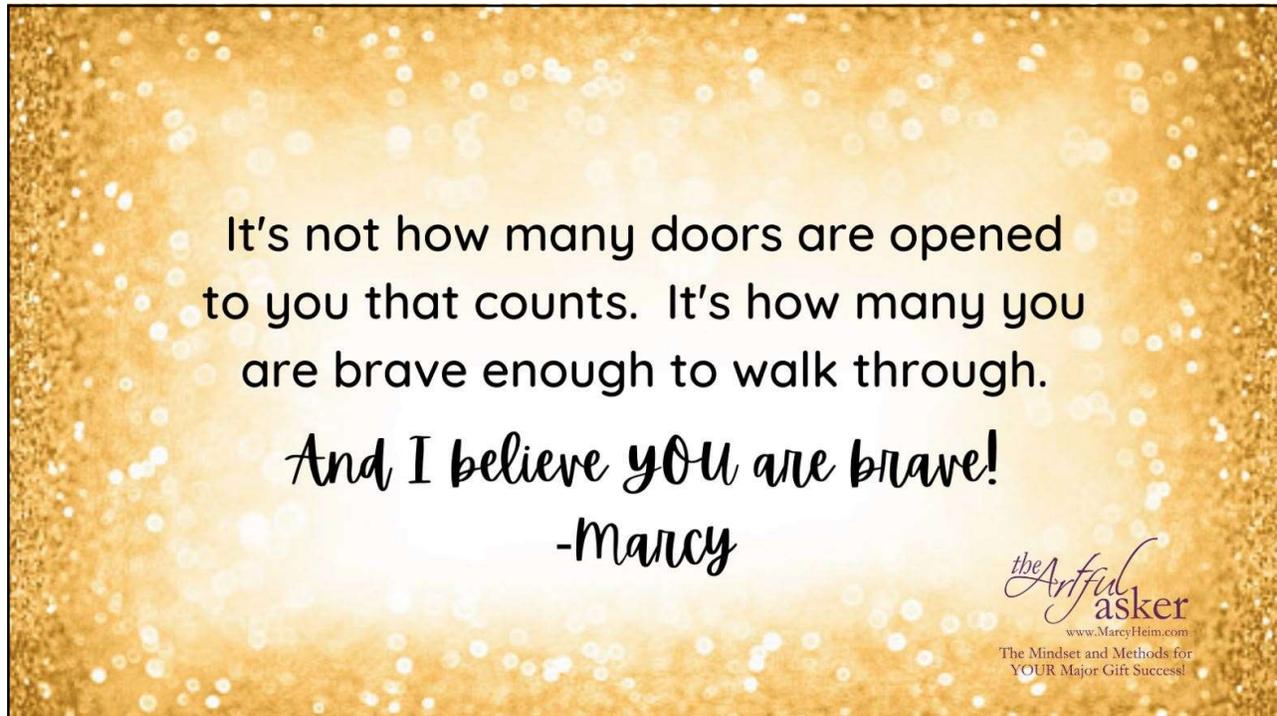
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Confidence  
takes Reps!

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