



The Life of a Legacy Match: Turning Inspiration Into Action

**Presenters: Meryl Cosentino
Abby Quammen
New York University**

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The Life Of A Legacy Match: How To Ignite Donor Generosity



NYU TURNED \$500K OF
UNDESIGNATED ESTATE
FUNDS INTO \$68M IN
FUTURE BEQUEST
DOLLARS – YOU CAN TOO!

Ready For It?

Like a radio station giving away free concert tickets, or bobblehead day at the ballpark, a Legacy Match program serves as a great incentive to encourage donors to document their legacy gifts.

Backstage in . . . The Life Of A Legacy Match

Insider Secrets!

- Concept
- Launch
- Execution



Be Fearless

Get Leadership Buy-in

Get Your Ducks In A Row

- Present a compelling case



Get Your Ducks In A Row

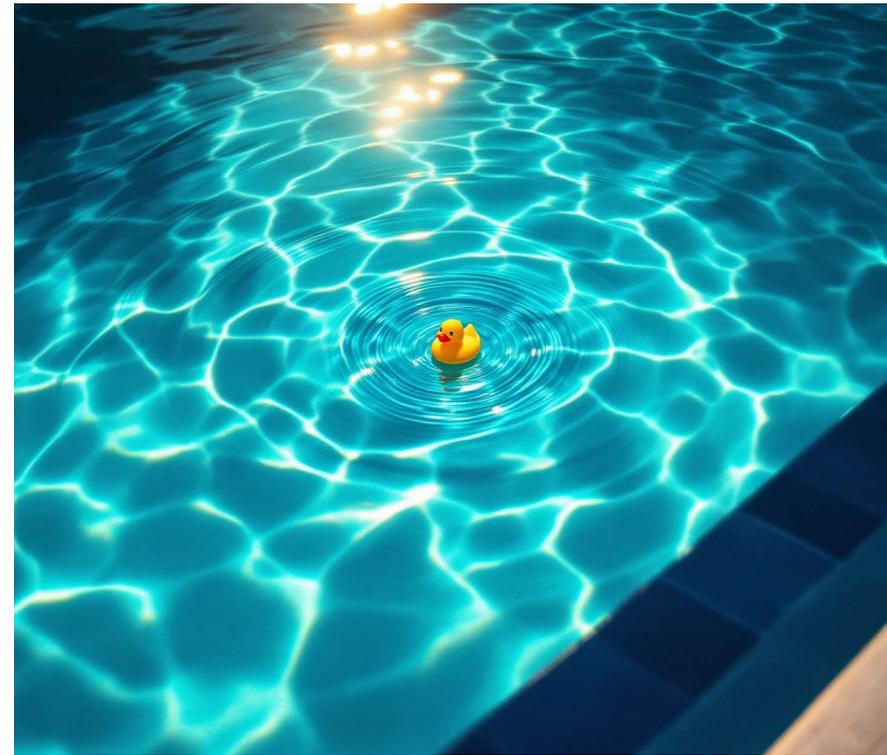
- Low Cost
- High Return
- If necessary, propose a Pilot or a Sprint Match to test the waters



Mastermind Strategy - C.A.S.E.

Show Leadership that the water is:

- Not too deep
- Not too cold
- They won't be the only one in the pool



Gold Rush - for Staff & Donors

- Staff - Mine portfolios for gems
- Donors - Stake their claim to a Match



What is a Legacy Match

A matching gift program that focuses on identifying and closing new planned gifts

Leverages a pool of unrestricted cash to encourage donors to document these planned gifts

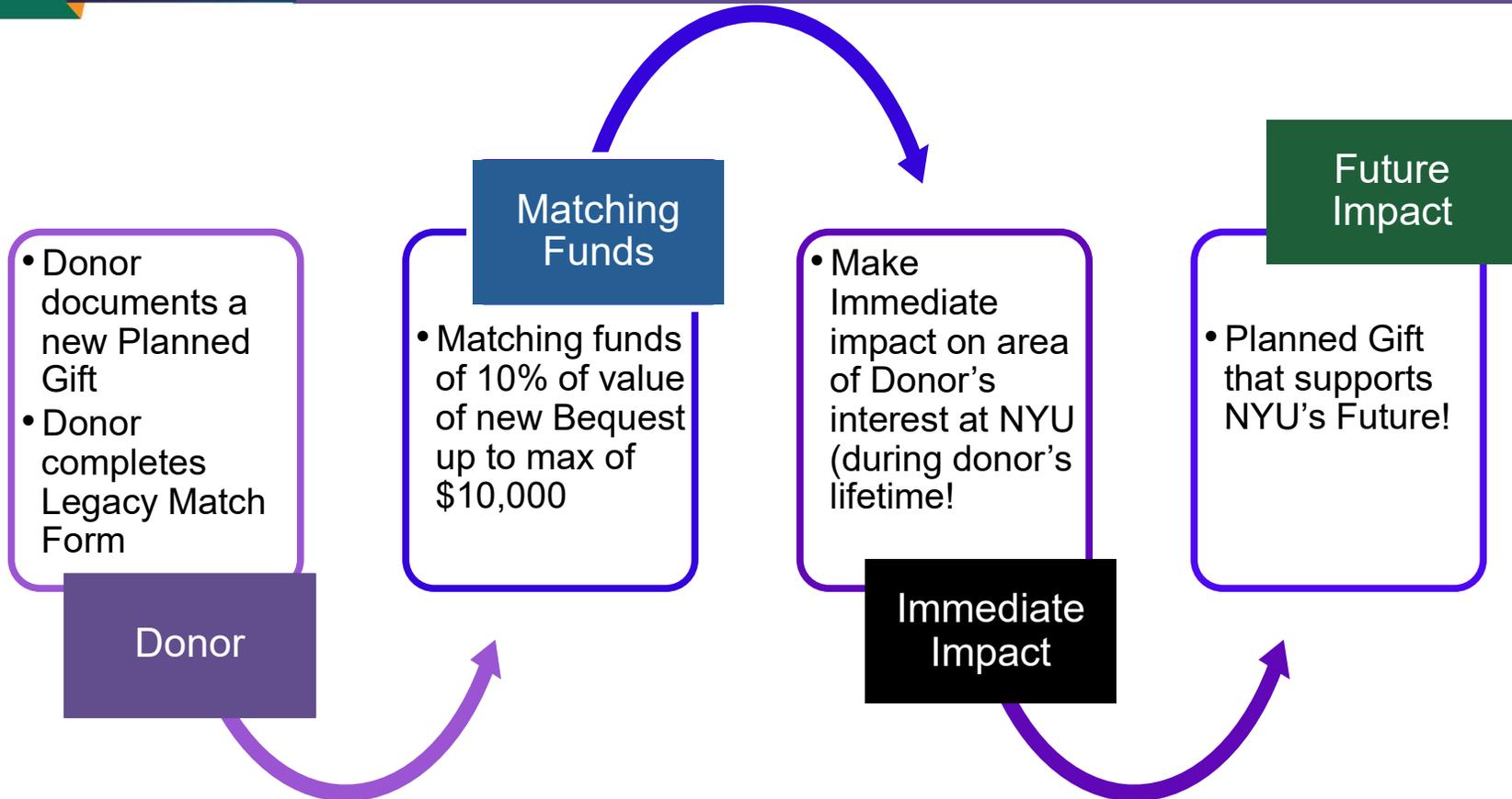
Legacy donors direct the matching funds to area of their own choosing for immediate impact during their lifetime

A Short Bridge

Our Legal Disclaimer – this should be in smaller print!



How It Works



The Procrastinator's Bonus



- Donors Respond
- Overcoming Inertia
- **80%** of planned gifts are revocable bequests
- **100%** new future dollars that likely wouldn't have been documented without the match!

Rules:

What types of
Planned Gifts will
count? **ALL (except
CGAs)**

What matching
percentage will be
applied? **10%**

What is the “cap” on
matching funds
allocated? **\$10,000**

Will documented
gifts be counted at
face value or
discounted value?
Face Value

Can matching funds
be directed to create
a new named fund?
No

Potential Return on Investment



NYU: What We Modeled for Leadership

Matching
Funds

\$500,000

Expected
Amount
Raised

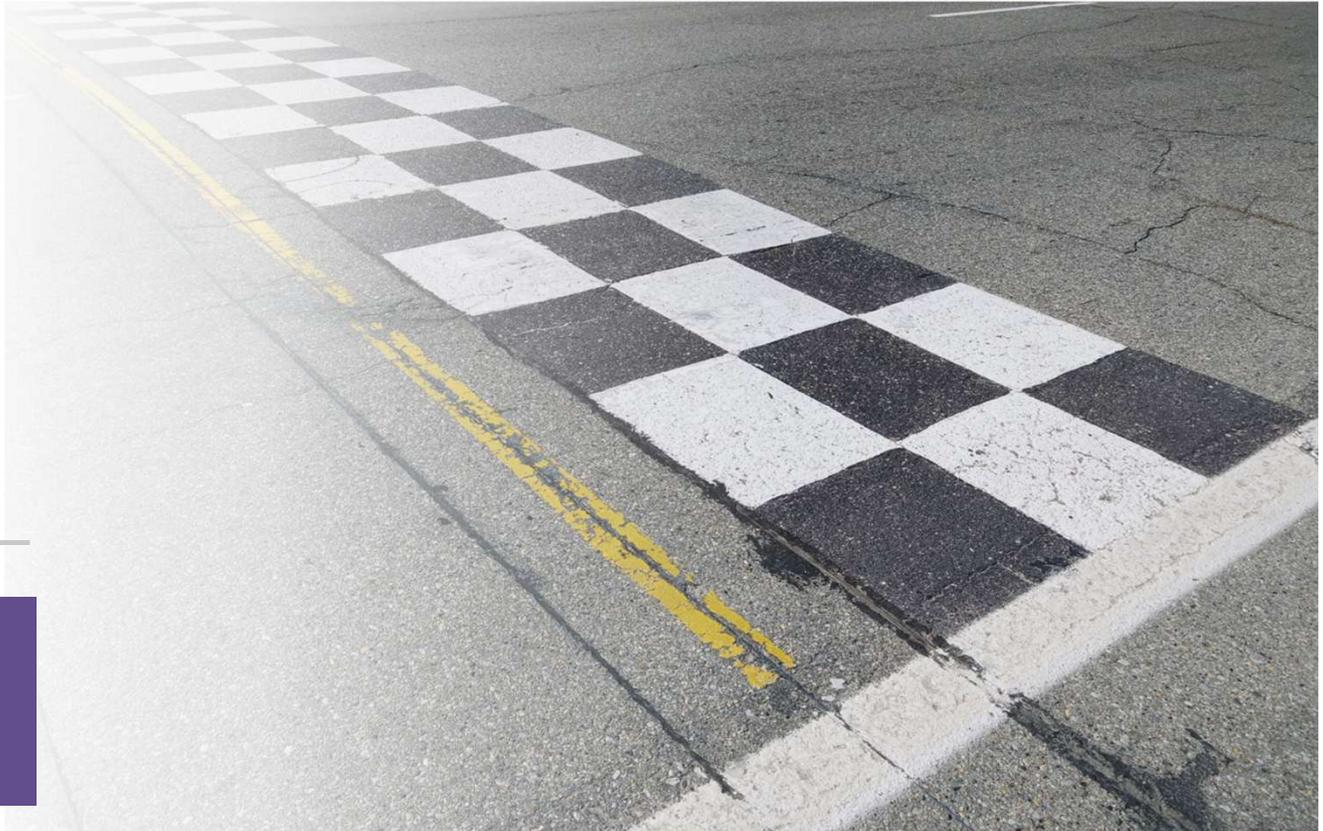
\$5,000,000
10:1 Return Rate

Potential
Amount
Raised

\$15,000,000
30:1 Return Rate

Roadblock

Rewrite the Script – find new
funding source





Got Creative

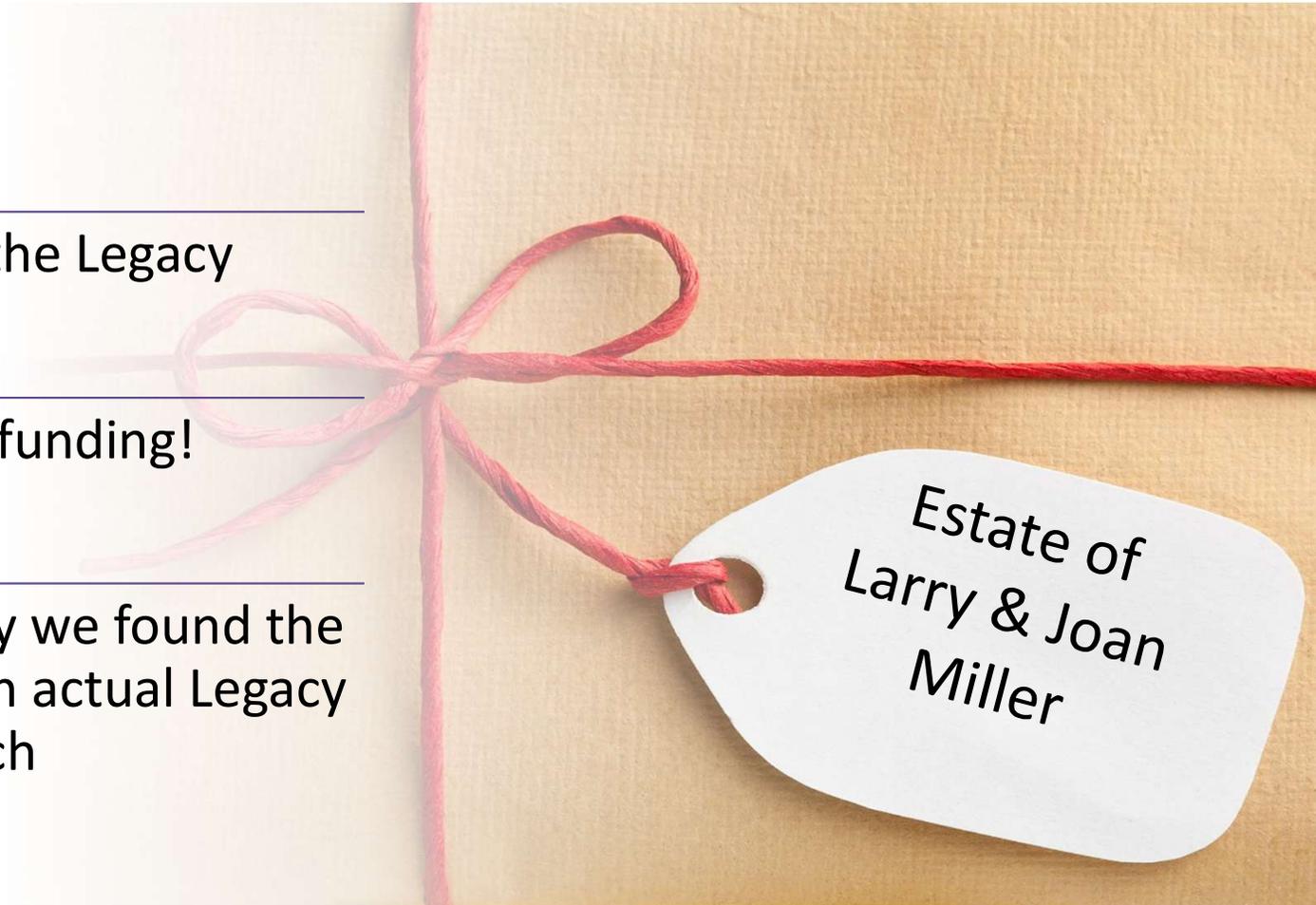
Found funding from an unexpected source

Invisible String

Senior Leadership Loved the Legacy Match idea, and . . .

The alternative source of funding!

Thanks to a little creativity we found the *invisible string* that tied an actual Legacy Donor to our Legacy Match



Box Office Results

\$500,000 to
\$68,000,000

Implementation

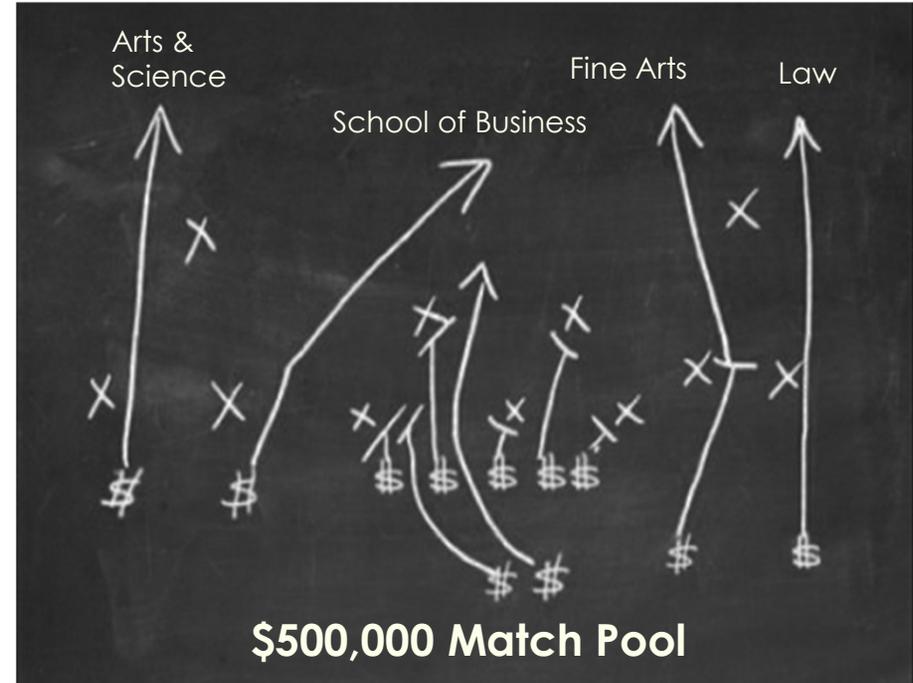
How we got to
our Standing
Ovation

Moving Gift Planning from the Sidelines to Center Stage

Playbook:

Train our Squad of Fundraisers

Get folks off the Bench & into the game



Documentation. Keep It Simple

It Doesn't Need to be Shiny and Ornate



Use Relatable Language



Cut Out the Legal Jargon!

Let your Form do the work for you

My Gift Will Be:

<input type="checkbox"/> A percentage of my estate ____%	<input type="checkbox"/> Payable-on-death account(s)
<input type="checkbox"/> A specific dollar amount \$ _____	<input type="checkbox"/> Beneficiary of a donor-advised fund
<input type="checkbox"/> Life insurance	<input type="checkbox"/> Real estate valued at \$ _____
<input type="checkbox"/> IRA or other retirement plan proceeds	<input type="checkbox"/> Other: _____

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JOIN OUR LEGACY MATCH!

YOUR FUTURE GIFT WILL GENERATE A \$10,000 MATCH TODAY

For a limited time, your new or increased legacy gift to NYU will generate a special matching gift! Simply fill out this form to notify us of your intent to include a gift to NYU in your estate plan. When we receive your signed form, NYU will make a cash gift of \$10,000 for each qualifying new or increased legacy gift valued at \$100,000 or more.

Your \$10,000 match can be unrestricted or designated to an area at NYU that is meaningful to you. The Legacy Match will run through January 31, 2025, or as long as matching funds are available.

Your future legacy gift will make an impact today and be remembered for generations to come.



My Gift Will Be:

A percentage of my estate ____%	Payable-on-death account(s)
A specific dollar amount \$ _____	Beneficiary of a donor-advised fund
Life insurance	Real estate valued at \$ _____
IRA or other retirement plan proceeds	Other: _____

Please provide your best good-faith estimate of the value of your new or increased legacy. If you need assistance in making this estimate, we would be happy to talk with you. Please call our Office of Gift Planning at (212) 998-6960.

I anticipate and estimate that my legacy gift may be in the amount of: \$ _____

Purpose of Legacy: _____

I understand that the information above will be held in strict confidence. **This is not a legal document and is not binding.**

Signature: _____

Name: _____

Degree / Year: _____ Date of Birth / Age: _____

Address: _____

Please email or mail the completed and signed form to:
 New York University, Office of Gift Planning, 115 Fifth Ave, 5th Floor, New York, NY 10003
gift.planning@nyu.edu

Motivate Donors Along the Giving Continuum

Have planned gifts
but have not
documented them
with your charity

Long-time donor
took action -
motivated by
matching funds

Motivated by the
rush of a deadline

CAS

IFA

Tisch

Traffic Management



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Communication Flow

Transparency and strong communication was key. NYU Fiscal officers were a key piece of the puzzle.





The Free T-Shirt of Planned Giving

Coaching

- Whether for a sports team, performer, or a fundraiser
- Coaching requires you to see and step into the shoes of both the client and the frontline fundraisers



Listen

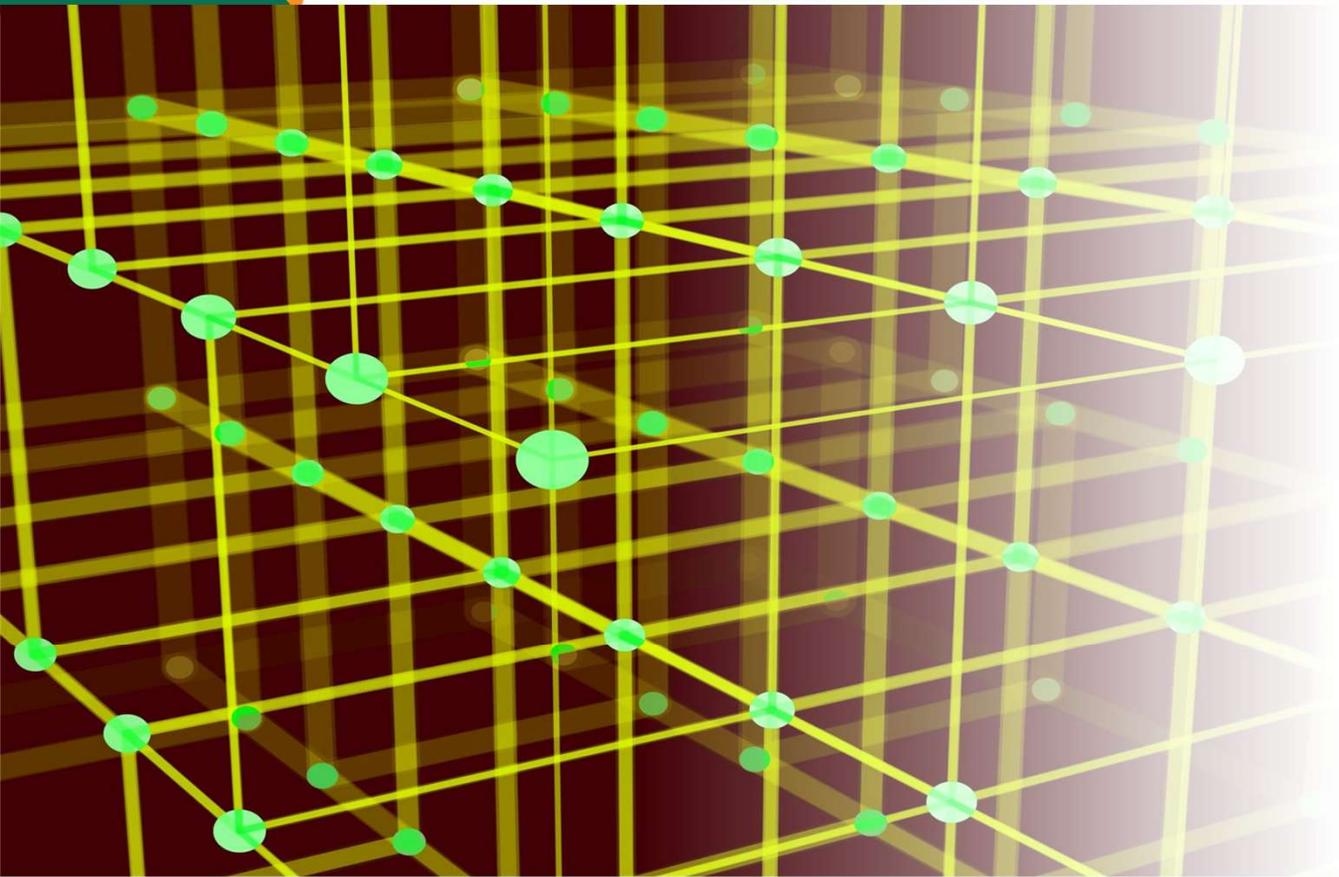
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Build Trust



Visualize

The power behind passing the torch

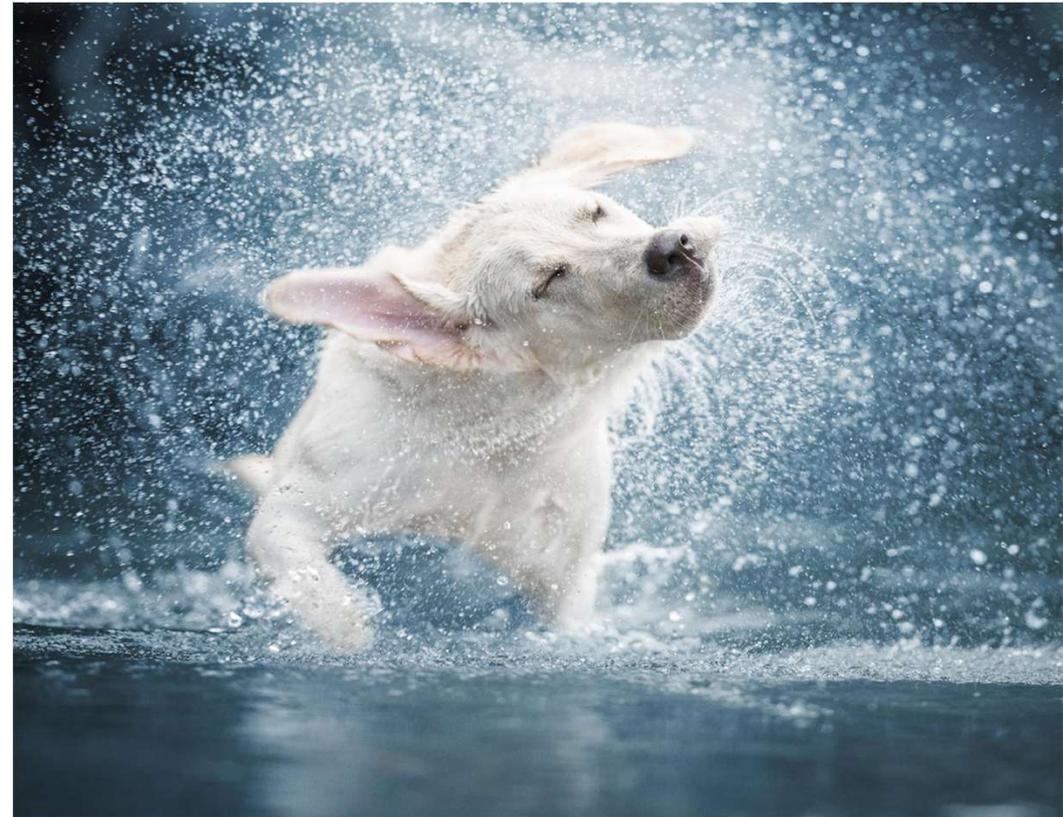


Training

A Key Component

Shake It Off

Common Donor Objections
and how to Overcome them



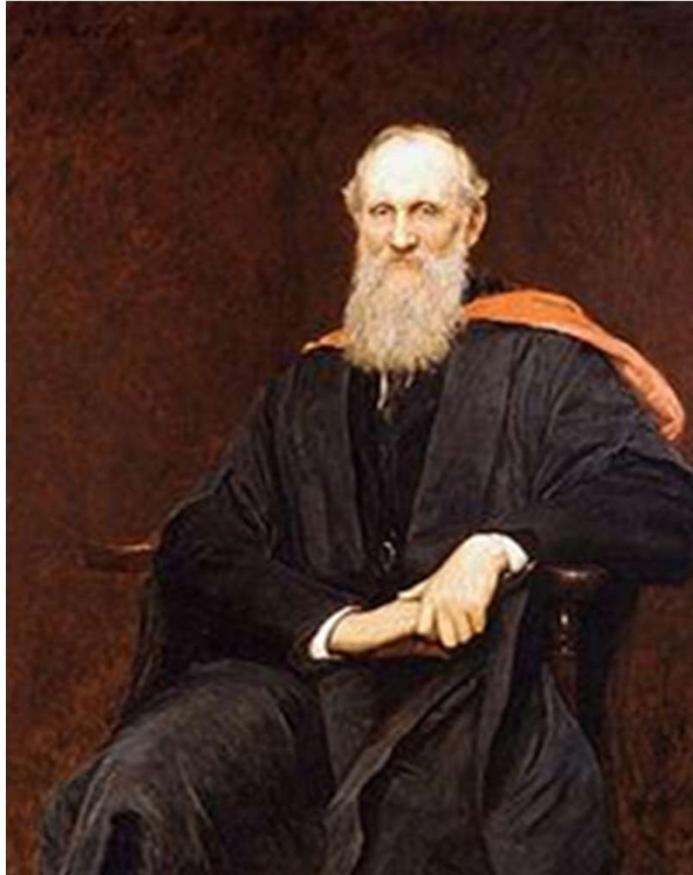
Created an in-house Training Program

- Regular Check-ins
- Staff Collaboration
- Role-playing exercises
- Ongoing support from experienced Gift Planning staff
- As well as Scripts for donor objections & FAQs
- And of course, we celebrated wins at all-staff meetings which kept the energy high all year long



To Measure is to Know

~Lord Kelvin,
Scottish-Irish Physicist



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- We measured
- Now we know!

Past Performance Does Not Guarantee Future Results

Expected

\$5 Million

Actual

\$68 Million

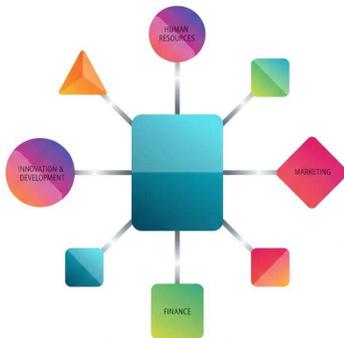
Future

**Be sure to temper
future expectations**

After Measuring, We Know...

**Collaborative
Bequests: 300%
Increase**

**Donor Visits:
37.6% Increase**



Our Operational Backbone

The Legacy Match Tracker

Keeping Motivation High

Gamification!



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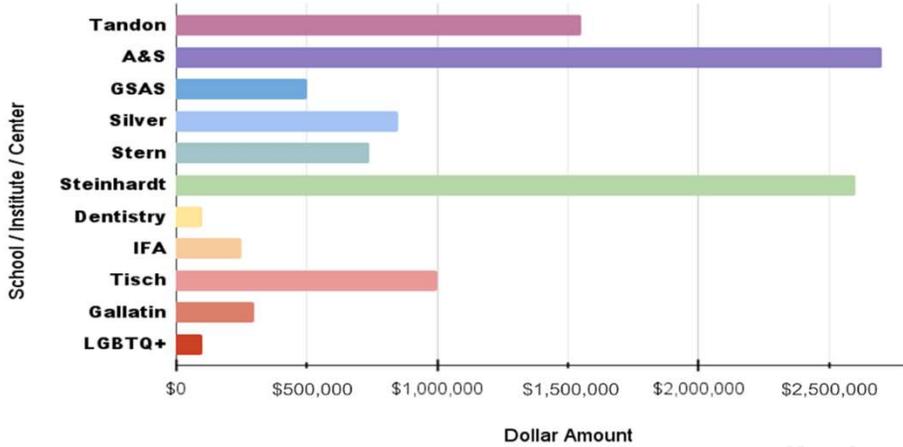
March Madness

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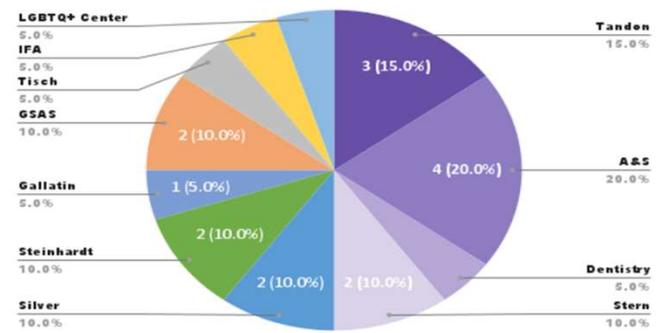
Dollars Raised = \$10,690,000



DON'T MISS YOUR SHOT!



Number of Gifts Closed = 20





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Kentucky Derby

3/26/2026

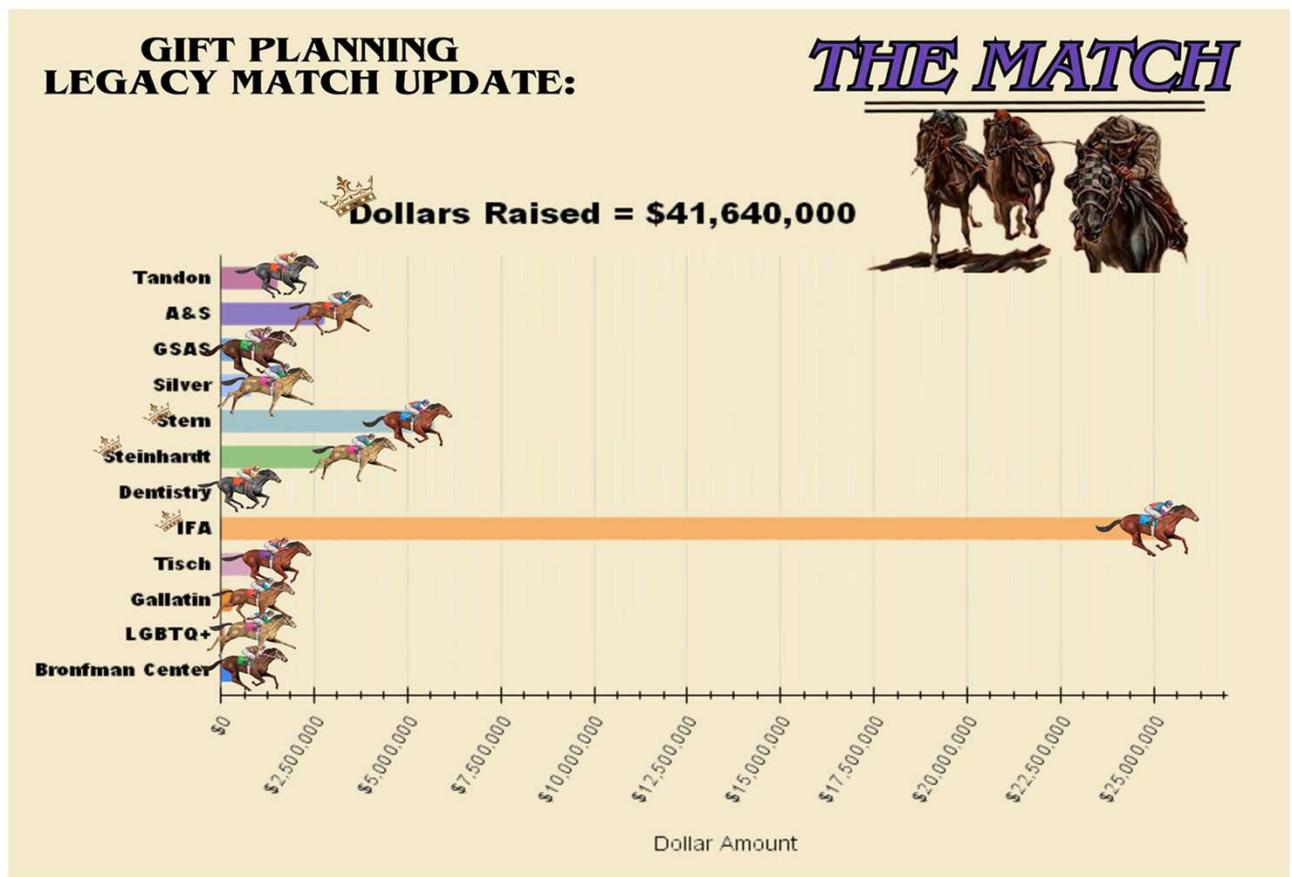
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**GIFT PLANNING
LEGACY MATCH UPDATE:**

THE MATCH





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Storytelling

Data is important for accountability. Stories move people to act.

Share with . . .

- Donors
- Colleagues
- Senior Leadership

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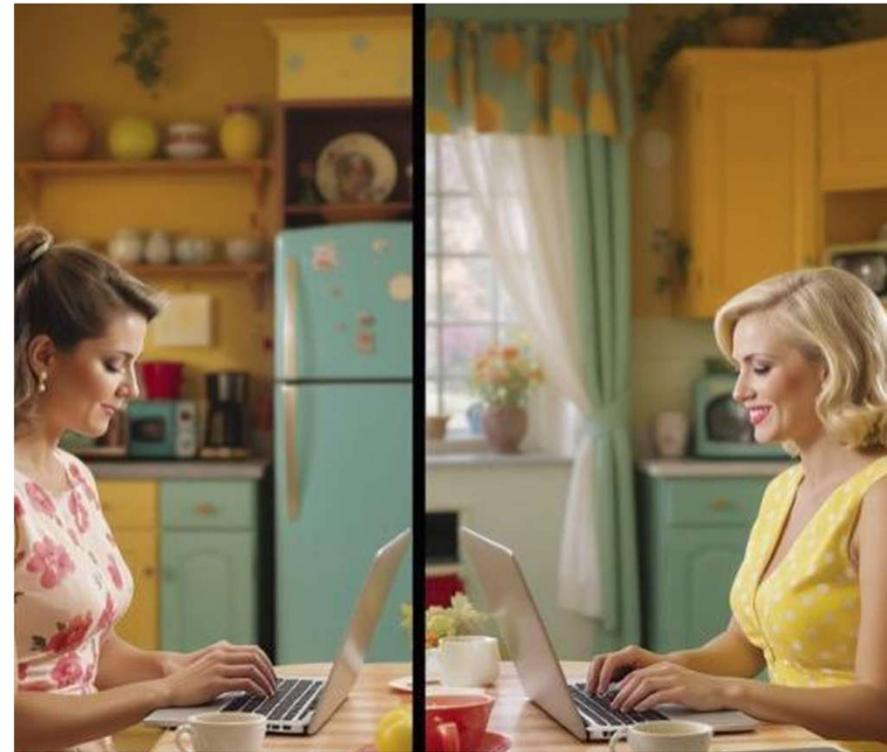
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How It Began



Coffee & Conversation

- Bond Grew
- 100% TOD - \$1.6M
- Home renovation
- Searching for Estate Attorney
- Unexpected loss of her daughter
- All along . . . holding onto one of our 50 Matches





- Fund a Student
- Attend Scholarship Luncheon
- Meet Student Recipient



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A Cherished Thank You

Meryl,

I had to wait a bit to express my gratitude for your kind gesture on behalf of the university. I cried a lot yesterday because I was so touched.

I so appreciate what you did for me as you have gone above and beyond what anyone else might have done for a donor. It's been a crushing year, but I know that next year will be better thanks to you.

With great affection,



Power of Human Connection

Beyond the Numbers: The \$10,000 match was a mere fraction of the \$3.5M Legacy

Profound Connection

Unexpected New Chapter: Unexpected inheritance will be basis of a second gift to honor donor's daughter



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True Cost of Legacy Match

Bagel Brunches for staff trainings

- \$500



Estate Funds Invested

- \$500,000

Future dollars raised:

- \$68 Million



Staff that is ready to inspire record-breaking campaign success

- Priceless

Begin Again

Next campaign. Can't give all the details but we will share some easter eggs.





Click the Q&A icon at the bottom of your screen.





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Still Have a Question?

Contact: Meryl Cosentino

E-mail: meryl.cosentino@nyu.edu
cosentino@martsandlund.com

Contact: Abby Quammen

E-mail: aq2117@nyu.edu
crownedbyqcoaching@gmail.com