

# 101 *Clever* QUESTIONS *That Unlock* PLANNED *Gifts*



INSPIRE DONORS  
SUPERCHARGE THEIR STORIES  
CLOSE THE DEAL





## Patrick O'Donnell

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From politicians and police officers to celebrities, crooks, and CEOs, our senior editor Patrick O'Donnell has asked his fair share of questions – and not always to friendly faces. With more than 20 years in journalism as both a writer and editor, Patrick has interviewed just about everyone (and been lied to by a few – he can tell). He's an expert at asking tough questions, navigating prickly subjects, and walking the fine line between persistence and provocation – all without losing the interviewee or his composure. These days, though, his toughest interviews might just be with your donors – they are constantly traveling, running businesses, or juggling packed calendars. Still, Patrick has a knack for tracking them down and drawing out meaningful stories that resonate.



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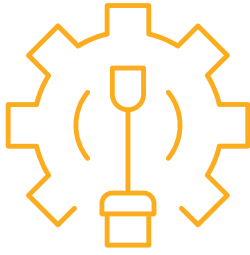
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# introduction

Knowing how to ask the right questions is an essential skill—one that can translate to success in all areas of your career and life. Good questions are the key to getting the kind of quality information you need, whether it's to write engaging, inspiring donor stories, or understand your prospect better so that you can prime them for the ask.

**But sometimes, it can be a real struggle to generate a list of quality questions. How do you get the donor to open up about their life, their gift, their passion for your mission?**

- ✧ **What do you ask?**
- ✧ **Which questions are relevant?**
- ✧ **Which questions are appropriate?**
- ✧ **Which questions cross the line?**
- ✧ **What do you do if a subject isn't talkative?**

We're going to show you a guaranteed process that will help you produce thought-provoking questions that generate quality, comprehensive answers.

And the best part is, whether it's an interview for a donor story, annual report, board report, newsletter story, job or candidate interview, or you just need a few questions to get a donor thinking about making a planned gift — all of these skills will translate.

**Let's get started.**



## STEP 1

# do your research

Few people want to hear this, but to properly prepare for an interview – whether it’s your first time meeting a potential donor or an interview for a well-known donor’s story – you’ve got to do some research first.

Sure, there are times you’ll have to wing it—like at a donor function, when your boss brings someone over and says, “You’ve got to hear her story—we need it in the next newsletter!” But to get the facts, the quotes, and the raw emotion that leads to the best stories or inspires a gift, you need to be prepared with some background information as a starting point.

To get started, look no further than your coworkers. Are you interviewing a well-known volunteer? A faithful donor? A potential board member? Start by finding out if any of your peers have worked with them, and what they can tell you. This can be a great way to gain insight not only into your donor’s history, but their personality, too. And while you’re at it, poll your co-workers about questions they would ask your interviewee—they may think of things you missed.

## NAME SEARCH

Do a simple internet search of the person’s name. Use a few limiting factors to narrow it down, like: “Jane Doe, Big University Vice President” or “John Doe, Cub Scout Pack Leader, Anytown Pa.” This can lead you to news stories, personal web pages, podcasts, staff bio pages, and more.

## SOCIAL MEDIA

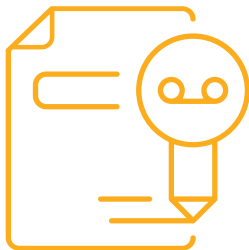
Peruse social media accounts, such as Facebook and LinkedIn, for career and background information to guide you. LinkedIn might tell you the vice president was among the first to break the glass ceiling, or you may learn that John Doe is a self-employed artist who illustrates comic books and lives on an organic farm.

Armed with that information, you could ask about the challenges the vice president faced moving up; the types of comics the artist enjoys drawing, or what they enjoy most about their farm.

By making a concerted effort to do research first, you’ll be a step closer to gaining your interviewee’s trust. They’ll see you put some effort into learning about them, and that you’re taking an active role in the interview process.

## STEP 2

# consider the nature of the questions



Now think about the purpose of the interview. Are you exploring the reason for a donor's gift, or seeking inspiration for a potential gift? Tapping into nostalgia for heartwarming content that converts? Writing a story as a thank-you for someone's support? Jot down your reasons, and see what questions naturally come to mind when you explore them.

Thinking about the weight of the subject matter, too, will help you form questions and guide the interview. Are you celebrating a pet adoption, or interviewing a survivor of spousal abuse? Use your discretion, and always tread carefully where trauma and loss are involved. Remember, you're dealing with a fellow human being – not a number.

Other considerations include:

- ✧ The personality of the person you're interviewing. Your subject may be a woman of few words, or a man with the gift of the gab. They may be friendly and inviting, or withdrawn and distracted. Some personality traits become apparent only in the moment, so unless you're interviewing someone you're familiar with, be ready to change gears on the fly.
- ✧ Your organization's mission, style, and tone. Are you a spunky start-up animal rescue group, or a purely scientific, stick-to-the-facts organization seeking a cure for Alzheimer's Disease? Check your style guide and read previous publications to see how other stories have been crafted. A few lighthearted questions might be appropriate for a story about a puppy rescue, but likely won't work for a story that revolves around a dementia patient.

### STEP 3

## brainstorm your questions



Given what you now know, it's time to find a way to find out what you **don't** know!

To keep the interview on track, write out a list of questions before you sit down with your subject.

Keep the queries short and simple. Don't write complicated, multi-part questions – you and your subject both risk losing focus. And whatever you do, don't try to wing it. That's a recipe for failure at worst, and mediocrity at best. Take your questions with you!

**Some of the questions will be obvious. In journalism, they're called the "Five Ws and How":**

- ✧ **Who – Who are the characters in your story? Get names, check spellings.**
- ✧ **What – What happened? What are the basic facts of the situation?**
- ✧ **When – When did your story happen? It may include multiple timelines.**
- ✧ **Where – Where does the story take place, or where is the donor from?**
- ✧ **Why – Why did a certain action happen? Why did a donor make a gift?**
- ✧ **How – How did it make you feel? How did you find out about our nonprofit?**

The great thing is, none of these questions can be answered with a simple "yes" or "no." They will all reveal important details that your story needs. Just phrase them in a way that feels comfortable, and you're already halfway there.

### STEP 3

# brainstorm your questions

One very important point: You may think you already know the answers to some of these “easy” questions. Find a way to ask anyway. Redundant? Possibly. But asking again ensures you have the most accurate, up-to-date information available.

“But I already checked LinkedIn,” you say. “Why ask again?”

Because LinkedIn profile details are not always current. “Facts” listed on websites and social media platforms might be opinions, inaccuracies, or outright lies. Media reports sometimes exaggerate or take things out of context. A.I. is used to create deepfakes.

Use your research as a starting point – not the definitive guide to your subject. Always verify the details with the source.

And if you’re feeling uncomfortable, or you’re dealing with an extremely sensitive situation, consult with someone who’s above your pay grade for advice on how to proceed.

**A Word of Caution** – Please, use discretion when asking “how did it make you feel?” questions. There’s a special place in hell for the interviewer who forces their subject to live through raw, difficult emotions just to get a good story.

## The Importance of Non-Verbal Communications

Sometimes emotions become obvious simply through the context of a story. Other times, you can show them in little details when you write the story: “John’s voice cracked when he remembered the day his wife got her diagnosis,” or “Betty doesn’t like talking about the day she and her daughter fled her abusive husband.”



## STEP 4

# open-ended and quirky questions

Some interviewees are tough to crack. They'll give monosyllabic answers instead of detailed replies. That's why phrasing is important. Sometimes, leading or open-ended questions produce better answers:

**"Are you happy you made the donation?" vs. "How has making the donation made you feel, & why?"**

And if you still don't get a satisfactory response, ask for more:

- ✧ **"That must have been amazing! Can you describe for me how it made you feel?"**
- ✧ **"That must have been difficult. What was the biggest challenge of getting through it?"**

Sometimes, to let the subject's personality shine through, you may want to ask quirky questions, such as,

- ✧ **What's your favorite TV show?**
- ✧ **What kind of music do you like?**
- ✧ **What do you do for fun?**
- ✧ **Vanilla or chocolate?**
- ✧ **Are you a dog person, or a cat person?**
- ✧ **What's your favorite food?**
- ✧ **What's your favorite drink?**
- ✧ **What's your favorite color?**
- ✧ **What's your favorite smell?**

Keep your questions (and your interview) conversational, but don't go too far off the rails. *These questions will not be used in every interview.* And even when they are used, the answers may not even make it into your story. But they can help your subject relax a little bit, help you get to know them better, and help build your relationship.

When you find things getting totally off topic, or your interviewee goes over the river and through the woods to arrive at an answer, don't be afraid to gently nudge things back on track. Circle back around to your original question, or change the subject entirely by asking something different.

Finally, don't be afraid to go off-script. Sometimes, the interviewee's answers may prompt you to think of other questions. That's OK—an interview should be an organic process, not a rigid, structured event.





# How to Approach Tough Questions

There are times when there's no getting around asking tough questions. Your interviewee may be reluctant to answer, or gives evasive answers. Should you drop the subject completely and move on? Press harder? Circle back later? That depends on the circumstances.

First, consider the questions you're asking and put yourself in the other person's shoes. Then pay attention to your interviewee's body language. If your subject is sitting with their arms or legs spread wide apart and is leaning into your questions, they're feeling confident and relaxed, so fire away. But if they are sitting with their arms crossed in front of their chest, or their hands in their pockets, they might feel defensive or uncomfortable. Do they have their hands on their hips, or an angry look on their face? That's a sign they're probably feeling confrontational. Before you go further, you need to make them feel comfortable—after all, you're working to build a relationship here. Adopt a casual (but not disrespectful) tone—don't fire off questions like you're a news anchor grilling a murder suspect. Begin by asking less sensitive questions, and escalate gradually. If appropriate, use humor to help them relax. Demonstrate understanding and empathy for your subject.

Sometimes it can help to prepare your subject by notifying them before the interview that some of the questions might be tough. This lets them know what to expect and helps them mentally prepare, rather than shocking them and causing them to shut down during your interview. It might be as simple as saying, "Some of these questions might be a little sensitive. I want you to know that I mean no offense."

Framing difficult questions with a negative assumption can also help to ease the blow. For instance, "It must have been really difficult to lose your father at such a young age. Can you tell me a little bit about how you coped?"

If your subject gives incomplete answers or dodges questions, it can be helpful to move on to something less difficult, then circle back later and frame the question differently or even indirectly. For example, "I see you've got quite the collection of baseball memorabilia. Did you play as a kid?" or "How did your childhood shape the way you're raising your own children?" or even "How did your childhood experiences inspire your gift?" could naturally lead the subject to expand on that difficult time in their youth.

Finally, use common sense. If your interviewee is too uncomfortable, you're going to do more harm than good by pressing for answers. Drop the question(s) completely and move on to something different.



## 31 Sample Questions: Getting To Know Your Donor

Now that we've covered the basics, here's a list of sample questions you can adapt to your own interviews.

Consider variations on these in the framework of the situation—the interview's purpose, the story you are writing, the donor's personality, their life experiences, etc. Context is everything. These are *not* meant to be asked in any particular order, or in every situation:

1. What led you to become involved with [organization name]?

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2. What is something you'd like to see your gift [and/or the organization name] accomplish?

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3. What motivates you to stay involved with [organization name]?

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4. What inspired you to give your gift?

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5. Has anyone else in your life played a role in supporting your dedication to us?

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6. How did giving your gift make you feel?

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7. Do you have any advice for people considering a gift to [organization name]?

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8. Do you have any advice for people who want to [something particular to your mission]?

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9. Where did you grow up?

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10. How do you feel your childhood shaped you?

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11. What is something you believed as a child that you view differently today?

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12. Do you have any advice on life, learning, and success that you can share?

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13. What is the biggest change you've see between [start of particular career/hobby/time period] and today?

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14. What is the biggest change you've seen in your lifetime?

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15. What do you do to relax? What are your hobbies?

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16. Can you name something that your parents, or someone else important in your life, taught you that has served you well?

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17. What advice would you offer for someone to follow in your footsteps as a [career, title, accomplishment, etc.]? (For example: "As the CEO of a Fortune-500 company, what advice would you give to those who wish to follow a similar career path?" or "As a woman who has balanced both career and family, what advice would you give for other working mothers?")

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18. If you could change one thing [that affects world, mission, etc.], what would it be?

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19. When you experienced [event, victory, tragedy, etc.], what were you thinking at the time? How were you feeling?

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20. What is your favorite memory of [career, childhood, event, etc.]?

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21. What is something people would be surprised to learn about you?

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22. How did you meet your spouse? Can you tell me a little about that?

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23. Of all the places you've traveled, can you name three that really stand out, and what made them special or different?

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24. What is something you wish [children, the current generation, etc.] learned today that you learned as a child?

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25. What one piece of advice would you give to future generations?

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26. Where did you go to school as a child? What were the circumstances that led to your attendance there?

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27. What is one of your most meaningful memories of your involvement with our organization?

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28. What aspect of our organization's mission means the most to you?

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29. Do you have a slogan, motto, or phrase that captures yours or your family's values and a message that you would like future generations to know about?

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30. What things are you and your family most passionate about? Describe your personal mission to further those causes.

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31. Can you think of any questions I missed? Are there any questions you would have asked if our roles had been reversed?

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# 36 Conversation Starters and Sample Questions Leading Up To The Ask

The right questions can shape the way you make your ask, provide information on how much to ask for, and deepen your relationship with your donor or prospect. As with the questions above, you do not need to ask them in any particular order, and you will not use every question in every situation – context is everything.

1. **What do you wish you could teach your children and grandchildren about giving?**

This can reveal what the subject values—and may also reveal important details about their relationship with their family.

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2. **When you hear the word “generous,” whose name comes to mind?**

Understanding who inspires your prospect can help you to shape your ask appropriately.

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3. **What’s difficult for you about charitable giving?**

This can reveal potential roadblocks to a gift—and help you find a way around them.

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4. **What was your very first charitable gift?**

This question can show you what cause(s) your donor finds important, and the inspiration behind their gift.

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5. **What historical events—world events or personal history—have influenced your philanthropy?**

Your donor’s worldview and background will inform their giving. The more you know, the better you can shape your ask.

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6. **What is the most precious thing you’ve ever given away?**

This can reveal a lot about the donor’s personality, and give you some insight into the level of support they’re willing to offer.

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7. **Who taught you about generosity and giving?**

This question can make the donor or prospect feel seen and valued—and that’s something everyone wants.

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8. **How do you decide which charities to support?**

This will give you insight into whether the prospect is a good fit for your mission. It can also help you tailor your ask by aligning with the prospect’s philanthropic values.

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9. **Tell me about your charitable giving experiences and your current giving plans.**

This will tell you where your prospect’s philanthropic priorities lie.

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10. **How involved would you consider yourself to be with the charities you donate to?**

Highly involved donors tend to give even more. They feel like they are part of something bigger—and that’s definitely something to strive for in your stewardship efforts.

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11. **Looking forward, do you feel that you will become more or less involved or change the amount that you will donate to charities?**

Learning your donor’s philanthropic expectations will help you shape your ask, and give you an idea of what to expect moving forward.

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**12. What would your parents think if they knew you were considering this gift?**

You should only ask this question if you already know the answer. This question has the power to move decisions forward.

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**13. How have your children been involved in your charitable giving efforts or decisions? What would they think of this gift?**

Parents often consult with their adult children when considering a planned gift—after all, it's their kids' potential inheritance. Understanding whether the children are on board with the gift decision can mitigate the chances of an ugly surprise later.

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**14. Do you prefer to give publicly or anonymously?**

Many donors are happy just to help, and don't want public recognition. Others want their gift shouted from the rooftops. Knowing their preference early on can save embarrassment later—and may even result in additional gifts.

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**15. Do you prefer to give to big organizations or small?**

This is another question that can help you shape your ask.

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**16. Do you donate throughout the year, or do you give at the end of the year?**

Some donors like to wait until the end of the year to weigh their tax needs with their philanthropic goals. Knowing which can help you plan. It can also give you an insight into their priorities and giving level—folks who actively leverage philanthropy's tax benefits are typically in high income brackets.

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**17. If I could show you a way to redirect your taxes and help our mission, would you be interested in talking?**

This question opens a giving conversation on a positive note, by showing the donor that there's a benefit in it for them, too.

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**18. Are you named after someone in your family?**

This will give you a glimpse into the donor's family life, and give them a chance to talk about someone who may have been important to them. Side note: Be sure to write your donor's name down, and ask for the correct spelling.

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**19. What is the biggest change you've seen in your lifetime?**

This is an especially poignant question for older donors, but we've all seen something that's affected us and our outlook on life.

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**20. Who knows you better than anyone else, and why?**

This can show you who made a difference in your donor's life; who's truly important to them.

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**21. Do you or your family have any favorite traditions?**

This question will give you some insight into the most important events and people in your donor's life.

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**22. Just out of curiosity, what is it specifically that you want to think about?**

There are times that a prospect just won't commit to making a gift. "I need to think about it," they reply. That doesn't mean they're never going to make a gift, just that they're not ready to do so now. Instead of walking away and potentially losing a gift for good, follow up with this question — effective salespeople use it all the time. It should net you at least a partial answer, and the information you gain will allow you to either reframe your ask on the spot, or try again at a future date.

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**23. What are you reading? What is your favorite book/who is your favorite author?**

This is a great question for folks who love to read, and their answers can reveal a lot about their personality and what's important to them. If they're not readers, that's OK—you just learned something else about them.

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24. **If you could change one thing about [situation that affects world, mission, etc.], what would it be?**

By finding out what your donor values, you can find out how to help them create a legacy.

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25. **What keeps you awake at night?**

You might get the same answer as above, or you might learn something new.

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26. **What drew you to [your organization]?**

Good stewardship starts with finding out what's important to the donor or prospect, and why they might want to help your organization.

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27. **How do you view your financial future as you age?**

This will help the donor focus on the three finance "buckets": needs (needed to survive), wants (something useful or lacking, but not necessary), and desires (more like a goal). As each bucket fills, the runoff flows to the next bucket. Find out which bucket the donor's philanthropy falls into—wants, needs, or desires.

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28. **Would you rather vacation in the mountains, or on the beach, and why?**

Off-beat, "would you rather" questions can reveal a lot about your donor's personality. This one off-beat question could possibly begin a discussion on gifts of real estate.

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29. **What's the most important value you think people should hold? Honesty, kindness, empathy, integrity, something else?**

This is an opportunity for your donor to tell you exactly what they value.

---

30. **What do you want to be remembered for? What do you want your legacy to be?**

This will help your donor decide how they want to invest in their legacy—and give you important information to create a customized gift plan.

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#### **Four questions leading to conversations about a planned gift in honor of a loved one:**

31. **Tell me about your journey since you first became involved in [this cause].**
- 

32. **Have others in your life been affected by [this cause]?**
- 

33. **Is there anyone in your family who also cared about [this cause]?**
- 

34. **Did your parents or other family members support any charitable causes?**
- 

#### **Two questions leading to funding specific endowments, scholarships, professorships, etc.:**

35. **If money were no object, what kind of an impact would you like your giving to have?**
- 

36. **What if [this goal was accomplished]? What would that mean to you?**
-



## 13 Questions To Learn How Your Donors View Your Mission

These questions will help you to see how others perceive your mission. If what they're seeing doesn't match up with the brand you're trying to project, it's time to re-evaluate how your nonprofit presents itself and adjust accordingly.

Stuck? [PlannedGiving.Com](https://PlannedGiving.Com) can help you rebrand.

1. What most interests you about our mission?

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2. When did you first realize our mission was important to you?

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3. What is one thing we do well and should never change?

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4. What is one thing we could do better?

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5. Why do you give to our mission?

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6. When you talk with friends about our organization, how do you describe it?

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7. What is the most important thing we do?

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8. If we could do one thing for you, what would it be?

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9. How did you feel after you made your last gift?

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10. What do you see as the future for our organization?

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11. When you think of our organization, does any one person come to mind?

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12. What most interests you about our mission?

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13. If your life was a book, where would our organization fit in and what would it say about us?

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## 14 Questions Every Donor Wants Answered

Donors and prospects have questions, too, and you need to have the answers they want to hear if you intend to land that gift.

A good interview, like a good conversation, should be a give-and-take. Be prepared to answer these common key questions to put your subject at ease and significantly increase the likelihood of getting that donation.

**Adapted from Harvey McKinnon's  
*The 11 Questions Every Donor Asks  
and the Answers All Donors Crave:  
How You Can Inspire Someone to Give  
Generously*, with some additions from  
PlannedGiving.com.**

1. Why me?

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2. Why now?

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3. Why are you asking me?

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4. Do I respect you?

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5. Can I trust you?

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6. How much do you want?

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7. How much do you actually need?

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8. Why your organization over another?

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9. Will my gift really make a difference?

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10. Is it easy to give?

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11. How will I be treated?

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12. Will I have a say over how you use my gift?

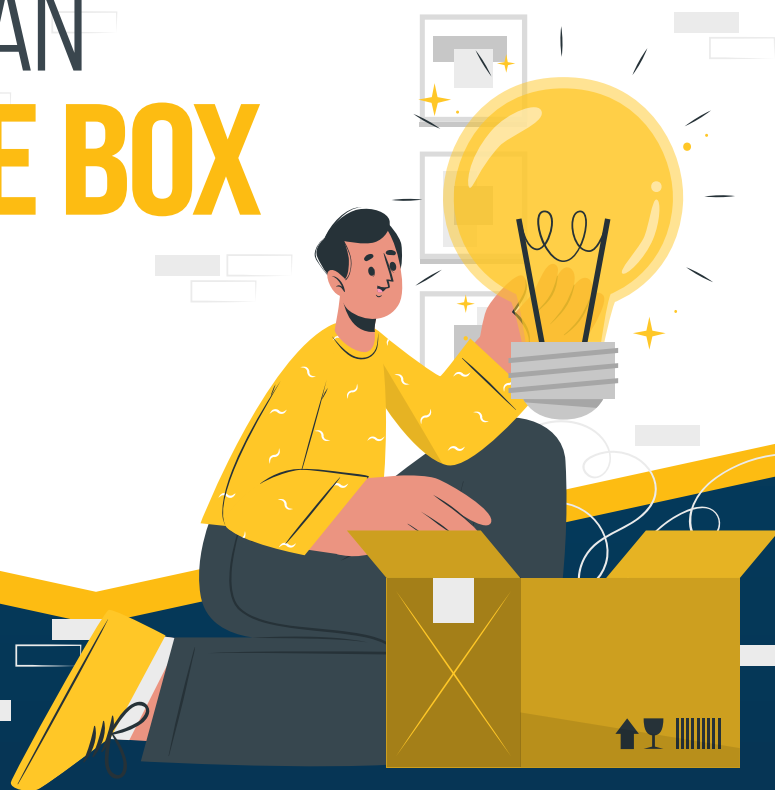
---
13. How will you measure results?

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14. Are there other ways to accomplish your goal that make more financial sense to me?

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# LOOKING FOR AN **OUT OF THE BOX** SOLUTION?



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- ✓ Content
- ✓ Templates



## The More You Know (Your Checklist)

Here are a few things to keep in mind when interviewing anyone, whether it's a consistent donor, a donor prospect, board member, or a potential employee. If you don't know the answers beforehand, work appropriate questions into your interview to discover them.

1. Do you know your interviewee's political leanings, so you can be careful with your conversation?

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2. Do you know if they have children?

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3. Are their parents alive?

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4. What kind of car(s) do they drive?

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5. Think about what questions you would **not** ask.

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6. Casual or formal attire for your meeting? Decide now.

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7. Do you know if they are a sports fan? If so, what teams?

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8. Do they drink alcohol? Eat meat? Are they vegetarian?

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9. Are they religious?

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10. Do you know what your interviewee does for a living?

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11. Be careful with strong opinions, even if they seem relatively benign. We heard a story about a fundraiser who didn't get far with his ask after sharing, "I hate tobacco" with the CEO of a cigar company (see previous question).

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12. Was the stock market up or down today?

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13. Understand basic facts about wealth and money. What do the top 1% earn? The difference between a million and a billion? (Hint: a million seconds is 12 days; a billion seconds is 31 years; a trillion 31,688 years.)

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14. Know the difference between income, passive income, and wealth.

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15. Look up real estate values in the donor's neighborhood.

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16. Spelling counts! Check, double-check and triple-check to ensure all names (interviewee, anyone they mention, business names, etc.) are spelled correctly. The importance of this cannot be overstated.

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## Notes

[illegible]



*PLANNED GIFTS*  
CAN GET **COMPLICATED.**  
*MARKETING THEM*  
**SHOULDN'T BE.™**



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