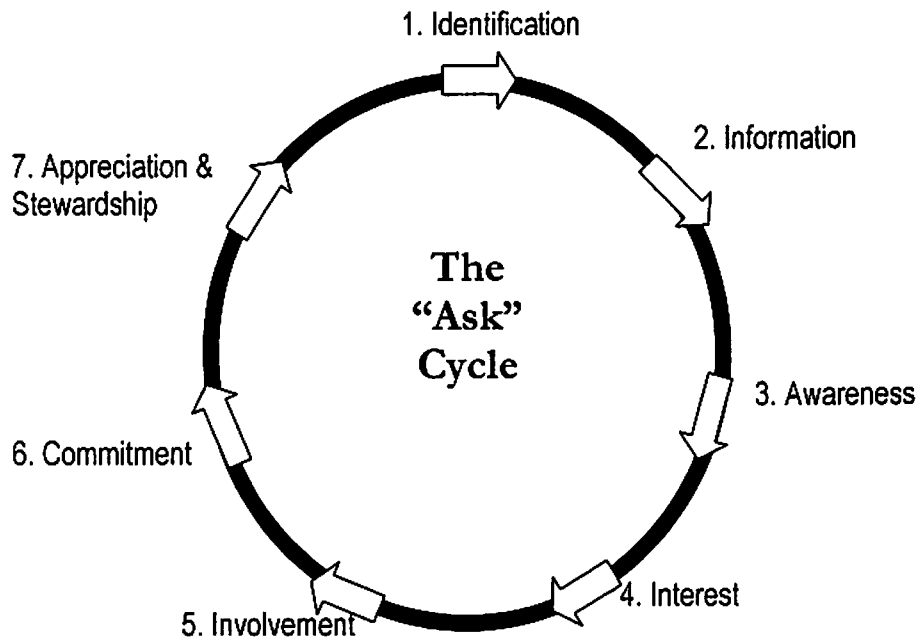


THE "ASK"



ASKING FOR THE GIFT

The right person(s) asking for
The right gift at
The right time

1. Identification

Choosing the prospects you intend to approach for a gift or commitment.

2. Information

Gather information about the potential donor and his/her family and share it with your legacy team.

Share information about your agency with your potential donors. This can be done in a variety of ways including:

- sharing your case statement
- sharing marketing materials
- having a constituent share why they give to your agency

3. Awareness

Building awareness of your agency's needs and how a donor's legacy gift will help fulfill your agency's mission. Do not assume that a potential donor fully understands what his or her gift could do for your agency.

4. Interest

Cultivate a donor's interest in your agency: invite a potential donor for a tour, an event and other non-fundraising events.

5. Involvement

Once a donor has shared his or her passion and interests with you – find ways to involve him or her in your agency through opportunities.

6. Commitment

As the commitment of your prospective donors increases, so will their willingness and desire to use their wealth (both now and in the future) for inspired philanthropy that benefits your agency.

7. Appreciation

As you get to know your donor, you may get a sense of her/his style and what they may desire in terms of appreciation. However, you should always have a conversation to clarify her/his desires for appreciation.

8. Stewardship

A phone call and a personal letter should be sent immediately (within 72 hours, preferably 48 hours). On-going follow-up on how the donor's donation is being used is essential to securing further donations and having that donor act as ambassador for your organization.