LEGACY STEWARDSHIP CHECKLIST

_______ **Send a personalized handwritten thank you note**

_______ Within 48 hours of receiving Letter of Intent

_______ Within 48 hours of receiving confirmation of formalized gift

_______ Periodically to show appreciation for their commitment

_______ **Personal phone call**

_______ A week after receiving Letter of Intent

_______ A week after receiving confirmation of formalized gift

_______ Periodically to stay in touch and keep informed/engaged

_______ **Personal meetings**

_______ To discuss formalization of commitment

_______ Periodically to stay in touch and keep informed/engaged

_______ **Keep accurate records** of all interactions with donor – separate file for each

_______ **Donor Recognition**

_______ **Personal Connection** – thank you note, phone call, cards, personalized letter, gifts, videos

_______ **Donor Listings/Testimonials** – newsletters, website, public display, annual report, in lobby, in event materials

_______ **Special Legacy Donor Events** – reception before “community” gatherings, Shabbat dinner, invitation to event not open to general community
Recognition at “Community” Gathering – legacy Shabbats, annual meetings, galas or other special events. Identify with “Ask me about my legacy” ribbons or stickers

Ongoing Communication – Letters/Newsletters

Engagement

Invite to speak at an event
Invite to serve on a committee and/or board
Invite to attend a non-legacy event
Involve them in a Legacy Shabbat
Ask to host an event for prospective legacy donors

Use Funds Wisely

Invest endowment funds with trusted partner
Maintain a state of financial well-being
Use donor’s funds as they intended

Report Your Impact

In newsletters and letters
In annual reports and at annual meetings
On website

Organize and manage stewardship in conformity with the Donor Bill of Rights

Other Stewardship Activities

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