



## 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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