



LEGACY MARKETING CHECKLIST

- _____ **Create a Legacy Society** – print names, post names, recognize at events
- _____ **Print on Envelopes and Stationery:** *“Be remembered forever by Temple Shalom with a gift in your will, trust, retirement plan or life insurance policy”*
- _____ **Highlight Donors - Use Tag Line when appropriate:** *“Made possible through a bequest”* or *“Temple Sinai thanks (name) (of blessed memory) for remembering the synagogue in his will.*
- _____ **Add special notation on nametags**
- _____ **Run Display Ads** – use HGF templates, or design your own
- _____ **Write Articles for Publication** – educational, short, varied, and readable
- _____ **Send a Newsletter** – articles, testimonials, display ads, contact info, website, reply card
- _____ **Use Flyers and Bill Stuffers**
- _____ **Put Information re: Legacy Society on your Website**
- _____ **List Donors**
- _____ **Publish Testimonials** – range of donors, use photos; print or video
- _____ **Distribute an Informational Brochure**
- _____ **Send Occasional E-mail Messages** – short, exciting, concise, easy, 4-6 times per year
- _____ **Use Targeted Direct Mail** – readable font, warm inviting tone, call to action, handwritten address
- _____ **Use Social Media**
- _____ **Plan a Legacy Event** – tag on to existing event, or event specifically to honor Legacy donors
- _____ **Connect with Professional Advisors** – educate them, enable them to assist clients