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