



Legacy Giving

Building Blocks

How it Works

Legacy Giving Building Blocks™ program focuses on a donor-centered methodology to solicit and close legacy gifts through the development of seven essential building blocks for your organization:

Mission, Endowment & Legacy Giving – Understanding why legacy gifts are important

Case - Articulating their meaning to your organization

Leadership – Effectively involving your board and staff

Prospects - Identifying and approaching the best supporters

Stewardship - Fostering and supporting relationships with those who commit

Communications and Marketing - Sharing your story about giving opportunities

Program Plan - Defining and building outcomes for sustainable revenue

Program Benefits / Outcomes / Materials

We provide the training, structure and resources needed to attract legacy gifts. With a time commitment of as little as a day per month of your time, we'll help you build a legacy giving program that engages your organization's leaders and supporters. Our approach will enable you to integrate legacy giving into your fundraising efforts and secure long-term support for your mission.

Benefits: Practical, user-friendly training with no previous knowledge or experience needed:

Easy to understand

No complicated terminology

Low cost / low time investment

All materials included

Tools to engage board, staff and supporters

Step-by-step plan

Program available 24/7

Easily customizable materials

Extensive resource articles

Realistic and achievable program goals

Outcomes: Enables organizations of any size to achieve meaningful results:

Culture of long-term philanthropic support

Legacy program infrastructure

Confidence to solicit legacy gifts

Program plan

Increased long-term support

Donor-focused communications

Board and staff ownership

Values-based stewardship

Materials: Includes fully customizable templates and materials:

Mission objectives and outcomes

Case statement

Leadership survey

Prospect identification criteria

Cultivation scripts and forms

Communication and marketing plans

Stewardship toolkit

Policy checklists

Planning tools

Program measurements

Sample gift language

And much, much more in our resource library