

MEMORANDUM

TO: BOSS
FROM: GIFT PLANNING STAFF
SUBJECT: First Quarter Gift Planning Report
DATE: DATE

I. GIFTS AND RECEIPTS

- Estates X totaling \$xxx (see attached)
- Bequests X totaling \$xxx
- Beneficiaries X totaling \$xxx
- IRA/QCD gifts X totaling \$xxx
- CRTs X totaling \$xxx
- CGAs X totaling \$xxx
- Life insurance X totaling \$xxx
- Other (real estate, art, TPP, etc.): X

II. STRATEGIC ACTIVITY

Strategy Meetings with Colleagues: ____

- GP Staff #1:
- GP Staff #2:
- GP Staff #3:

Strategic Discussions—select colleagues/donors:

- GP Staff #1:
- GP Staff #2:
- GP Staff #3:

III. Stewardship

A. *Legacy Society* [Began the year @ ____ members]

- This quarter: __ new members
- Goal for 2020: ____
- Mailings/events summary:

IV. MARKETING & EDUCATION

A. *Staff Trainings*

- Tip of the quarter
- Group trainings and topics

B. *Marketing*

Summarize Plan for 2020: marketing pieces including newsletters, postcards, surveys, letters, other

C. *Website Activity*

Highlight “visits” to key areas of the site (gifts by will, bequest language)

V. MISCELLANEOUS

A. *Highlights of the quarter*

- (select a few)

B. *Select Metrics*

- *Estates: Highlight large estates*
- *Legacy society members:*

C. *Estate Planning Committee*

- Summary of plan for the year:
- Outreach/meetings: