TOP TEN BEQUEST-READY TIPS

1. Do your own Will first – learn about estate considerations by going through the process and set an example for your Board, staff and donors.
2. Develop sample bequest language – look at samples from other organizations, but have your language reviewed by a lawyer.
3. Have your legal name and charitable business registration number at your fingertips!
4. Encourage individuals to self-identify – using the reply forms or coupons in your newsletters, publications, annual report, event feedback forms, web site or other communications. The key statements are:
   a. I would like more information about how I can help *ABC charity* through my Will or estate plan.
   b. I have already named *ABC charity* in my Will.
5. Piggy-back on annual fund development – check off boxes on direct mail reply device, event goodie bags, in memoriam or tribute programs, annual fund, major gifts, articles in newsletters or on website.
6. Tell your organization's story through testimonials - inspire others to consider their own legacy. Talk about the giving. Talk about the impact.
7. Build a prospect file – keep a record of contacts with individuals, professional advisors, volunteers, anyone who requests information. Track prospects and confirmed donor expectancies – keep them involved.
8. Follow up – by phone, in person, through mailings, newsletters, and publications to keep prospects and donors involved.
9. Educate your Board about bequest gifts – they can make one too.
10. Educate your staff about bequest gifts – so they are ready when the phone rings or the donor drops into the office.

Then you can move on to the administrative systems, policies, recognition tools, advisory committees and other processes that if you were to think about them first, you would have trouble getting to lift off.