

TEACHING OTHERS ABOUT PLANNED GIVING

Planned Giving Event Planning Worksheet

Has your fund completed a challenge grant or done something else to develop recognition and momentum in your community?

Does your fund have a history of planned giving?

What would your fund's purpose be in holding a Gathering Event?

What gift planning topics do we want to learn about?

Who should "own" planned giving on our fund? Individual or committee?

Where would we hold a Gathering Event? Who can host?

Who should be at our Gathering Event? (10–20 individuals)

Who could give a testimonial?

What will our follow-up plan be? Who does what when?