
Bequest Marketing Worksheet

Identify Bequest Prospects

Who are your bequest prospects?

Most of your bequests will emerge from four groups (see page four of Bequest Plan Outline in your Live On Binder. The list is listed in your PowerPoint notes).

Create a Case Statement

Why a bequest?

What is the value of your organization in the community?

What are the values your organization stands for?

What impact will bequest/endowment have on your organization?

Using the above information write your *Live On* case statement.

Write your rationale for requesting legacy gifts in fewer than five sentences.

Write it in one sentence.

Develop Market Strategies to Reach Donors

How are you going to communicate with your primary audience who are most likely bequest donors?

Do you have outreach materials that are specific to your primary bequest prospects?

Can existing materials be restyled or supplemented to address your bequest prospects?

How will you incorporate your case statement into your materials?

Evaluate Your Organization's Marketing and Communications

Conduct a SWOT analysis. What are your communication/marketing strengths, weaknesses, opportunities and threats surrounding involvement in *Live On*?

SWOT

Strengths

Weaknesses

Opportunities

Threats

Can you use your strengths and opportunities to inform your case statement?

Do the weaknesses and threats affect your marketing plan?