

Asking

for the planned gift

What's wonderful

to you about asking for a gift?

1. _____
2. _____
3. _____

CASE STUDY:

DESCRIBE YOUR CHALLENGE:

NAME (A FAKE ONE FOR EASY REFERENCE)

BRIEF DESCRIPTION OF THE SITUATION

WHY ARE THEY INVOLVED?

WHAT DO THEY WANT TO ACCOMPLISH WITH THEIR GIFT?

DESCRIBE YOUR NEXT STEP:

Who
will you ask next?

- 1.
- 2.
- 3.

NOTE: FOR DONOR CONFIDENTIALITY WHEN WORKING WITH YOUR PARTNERS, PERHAPS YOU USE ONLY FIRST NAMES OR NICKNAMES?

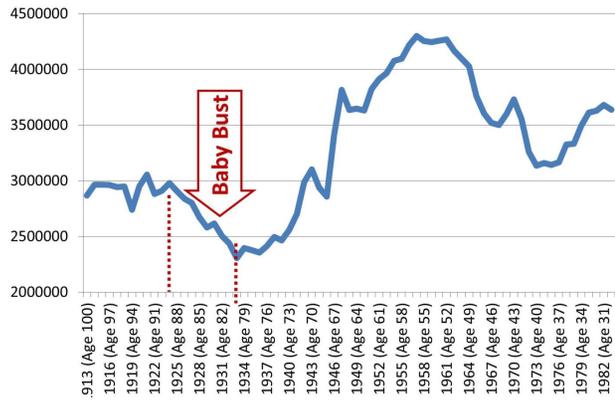
When
will you take your next step?

DESCRIBE YOUR NEXT STEP?

When
will you check in with your partner?

What
is the most useful thing your partner can do to support you?

Population trends: Births



From: American Charitable Bequest Demographics, Russell James

Why ask?

Find a partner!

What
is stopping you?

Find a partner!

Who
will you
ask next?
