Post-Death Stewardship Checklist

As soon as you learn of the donor's death

- Notify colleagues
- See that a condolence note goes to the surviving spouse/family.
    - Depending on relationships this might be from:
        - You
        - Director of Development/Planned Giving
        - CEO – few situations when the CEO should not write a note!
    - Ghost-write if necessary
    - Find out with whom to communicate, if necessary
- Find out about funeral/memorial
    - Consider attending or sending a representative
    - Consider sending flowers/food
        - Be sure to check on cultural customs!
- Notify database manager to update mailing list
    - Beware – there may be multiple lists
    - Confirm how widow wants to be addressed
    - Reconfirm that databases have been changed
- Place obituary in appropriate organizational publications
- Review records for information about expectancies
    - If there is a bequest/trust – go to bequest checklist
- If there is a life income gift – go to life income gift checklist
- Check for outstanding pledges
    - Determine what to do about them and when
- Identify the "donor's representatives"
    - for estate matters
    - for personal contact
- Designate an internal contact person for matters relating to the estate