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### **Planned Giving**

#### **Goal: 100 members in the Legacy Giving Circle**

- **Marketing Strategy:**
  - Develop planned giving brochure
  - Develop other planned giving written materials
  - Update all TLC planned giving outreach – mailing, email blasts, update and improve info in Facebook, newsletter, twitter, etc.
  - Create 12 month marketing calendar with schedule of mailings, phone calls, and activities
- **Outreach Strategy:**
  - Develop planned giving outreach list
  - Decide if we want to do a matching gift campaign
  - Develop outreach script
  - Find volunteers to help with outreach
- **Program Sustainability Strategy:**
  - Host Legacy Giving Circle launch event or party
    - Give members of Legacy Giving Circle special recognition gift (lapel pin, tree seedling, etc.)
  - Create yearly events for members and potential (President's Luncheon, special cocktail party, intimate dinner, etc.)
  - Continue to develop ways to nurture relationship with current living members
    - Gather testimonials

