

## Legacy Society Talking Points for Follow-up Calls

1. Prioritize your follow-up calls. Begin with active donors and those who stretched to make exceptional gifts.
2. Thank them for their past support and express the Foundation's appreciation before discussing another gift.
3. Confirm that they received your letter inviting them to join the legacy society and have read it. (If they haven't read it, they may ask you what it said, so be prepared to share the facts about the Legacy Society, i.e., how their gifts make a difference, and that donors will be recognized as Legacy Society Donors at INWCF's annual reception.)
4. Ask "When would you be available to meet?" Provide a couple of options.
5. Answer any immediate questions but let them know that if it is okay with them, you prefer to wait until you meet to go into much detail.
6. Thank them ...
  - a. For agreeing to meet with you at [confirm time and place]
  - b. For taking the time to speak with you (whether they confirm a time to meet or not)

Questions or concerns? Call PJ Watters at (509) 624-2606.