

LEGACY GIVING: Understanding Marketing Goalsⁱ

	GOALS				
ACTIVITIES	Contact New Donors	Develop New Leads	Maintain Contact w/Donor	Recognize and Thank Donor	Close Gift
Direct Mail	X	X			
Mail Targeted Collateral	X	X	X		
Seasonal Mail w/ Special Collateral	X		X		
Newsletters	X	X	X	X	
Website	X	X		X	
Donor Visits			X	X	X
Recognition Societies			X	X	
Recognition Events			X	X	

ⁱ Demystifying Planned Giving Marketing; Kathryn W. Miree & Associates, Inc.; <http://www.kathrynmireeandassociates.com/PDF/DemystifyingPlannedGivingMarketing.pdf>