



# Everyday Planned Giving LLC

## Board Legacy Goals

### SETTING GOALS

#### **YOUR MINDSET: WHICH LEGACY GIVING OBSTACLES RELATED TO YOUR BOARD DO YOU WANT TO OVERCOME?**

E.G., Asking for the legacy gift? Allocation of resources? Losing an annual gift? Complexity of the gift vehicles? Competing priorities?

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#### **ENGAGING YOUR BOARD WITH LEGACY PROGRAM:**

E.G., Identifying an ambassador; create a committee; regularly report to the board?

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#### **YOUR ORGANIZATION: HOW WILL YOUR ORGANIZATION BENEFIT FROM LEGACY GIVING?**

E.G., What programs would it be able to do? New facilities or technology? Improved organizational culture?

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