**Donor Contact Form for Planned Giving**

Name of Fundraiser: Date:

Donor’s Name:

Type of Contact: \_\_\_\_\_Visit \_\_\_\_\_Event \_\_\_\_\_Phone \_\_\_\_\_Call \_\_\_\_\_Letter

Reason for Contact:

Planned Giving Candidate? Yes No

* Type of Vehicle:
* Estate Gift
* Stock
* Gift Annuity
* Charitable Trust
* Retirement Plan (IRA)
* Life Insurance
* C.D.
* Real Estate
* Personal Property

Comments:

Next Move:

|  |  |  |
| --- | --- | --- |
| Date | Person Responsible | Move |
|  |  |  |

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