

# LEGACY STORY IDEA WORKSHEET

This worksheet will help you start organizing details for your next donor story project. Think about a donor you may want to feature, and jot down some notes in the spaces below.



Name of donor:

Current place of residence:

Marital/Family status:

Donor's primary gift vehicle (bequest, CGA, beneficiary designation, etc):

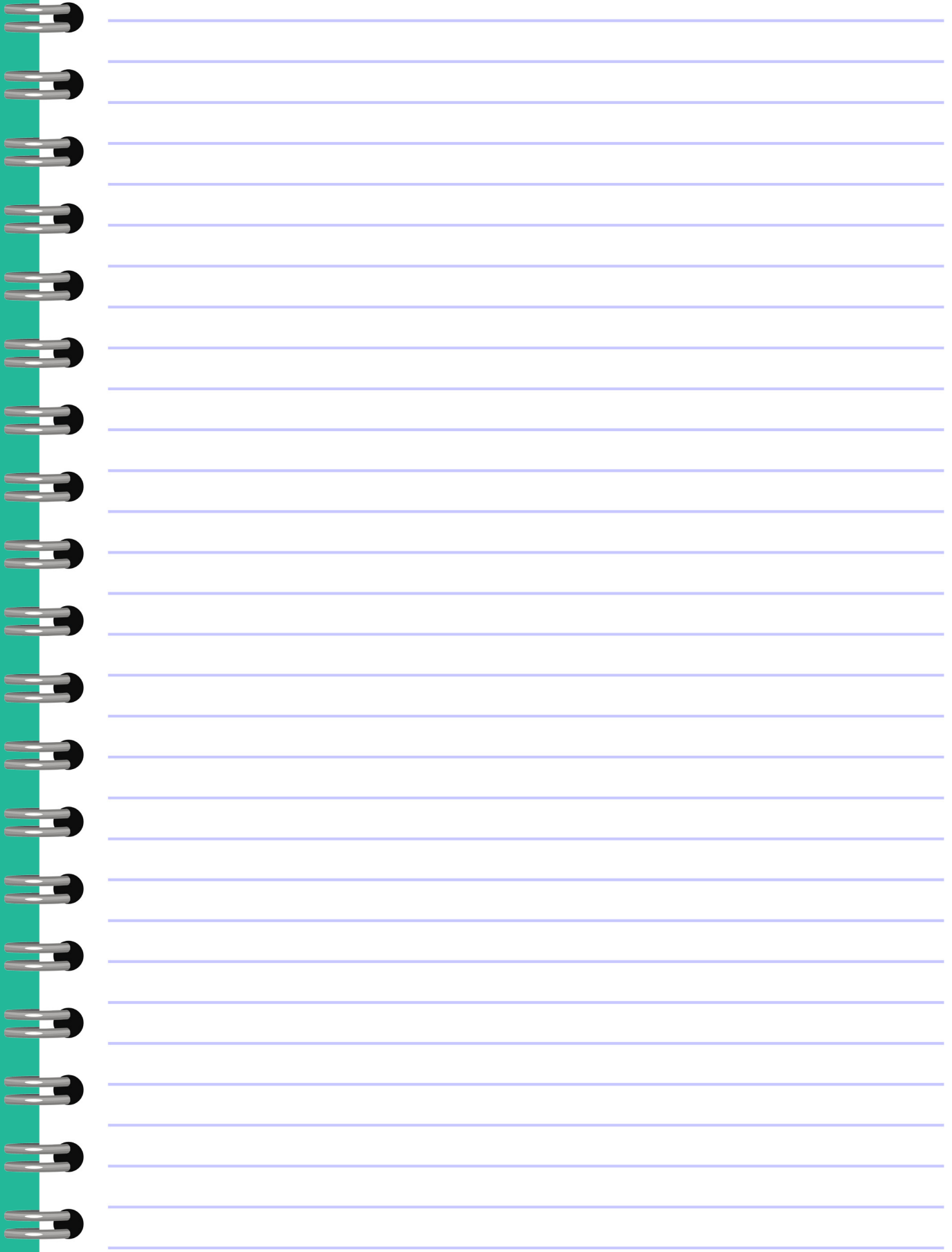
Why do you think this donor has a good story to tell?

What do you think is the primary reason your donor cared enough to make a bequest or other philanthropic gift?

Check any that apply:

- Donor has been featured in other organization communications/publications.
- You feel donor will agree to be photographed.
- Donor is a current/former board member, volunteer or has other leadership role. (These types of donor stories may be best for "niche" outreach like a peer letter.)

# LEGACY STORY NOTES

A spiral-bound notebook with a white page and 20 horizontal blue lines. The spiral binding is on the left side. The page is otherwise blank.