



Charitable Gifts Worksheet

Nancy Beard, CFRE

Thought Work

What are your thoughts concerning asking for charitable gifts?

1.
2.
3.

What do you want your thoughts to be concerning asking for charitable gifts?

1.
2.
3.

Where are you with fund development?

We are successful because:

1.
2.
3.

We are not successful because:

1.
2.
3.

It Takes a Village

Who are your current fund development team mates?

1.

2.

3.

4.

5.

6.

Who do you want on your fund development team?

1.

2.

3.

4.

5.

6.

Why do you need the money? Case(s) for Support

1.

2.

3.

4.

5.

6.

7.

8.

Annual Development Plan

Financial Goal \$

Action Goal #

What are the components of your annual campaign

1.

2.

3.

4.

Who Are Your Planned Giving Prospects?

1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	

Great Ideas That I Think of During this Session

1.

2.

3.

4.

5.

6.

7.

8.

Contact Information

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