Getting your organization ready to secure your future.

A checklist to guide your organization to build your endowment.

1. Educate and engage your organization’s leadership
   - Be certain you can articulate what a strong endowment will do for your mission and future.
   - Engage your board and committees with endowment building and legacy giving through a brief presentation. *YVCF staff would be happy to provide this presentation.*

2. Communicate the value of endowment building and legacy giving
   - Make sample bequest language and your legal name available. Include one-line planned giving messages in your publications and website.
   - Print and distribute endowment and planned giving fact sheets at your offices, board and committee meetings and in appropriate mailings
   - Include articles about endowment building and planned giving in your publications and website.
   - The more your prospective donors see your messages, the more likely they will be to increase their giving. Repetition is key!

3. Engage, educate and recognize endowment and legacy donors
   - Identify prospective endowment and legacy donors.
   - Mail solicitation letters to prospective legacy donors.
   - Follow up on the mailings by having your staff and/or volunteers contact the prospective donors. *YVCF staff can provide detailed gift examples and provide contact information for estate and/or financial planners to donors who request assistance.*
   - Establish a Legacy Society to recognize and thank your donors. *YVCF can help you through this process.*

Real generosity toward the future lies in giving all to the present.
— Albert Camus