*#iGiveCatholic**Planned Giving Email Template*

to Organization from Diocesan/Foundation Parter

Dear [org contact name],

It was great catching up with you on the phone today. Congratulations on your successful #iGiveCatholic campaign! It was exciting to see that one of your donors was interested in learning about making a gift in their will to [organization].

As we discussed, one of the donation form questions donors answer when they made their gifts was whether or not they would like to be contacted about leaving a gift in their will.

[donor name], indicated that [he/she] would indeed like to be contacted about leaving a gift in [his/her] will to [org *or* org program]. This is such a wonderful opportunity for you to engage in a deeper relationship with this donor.

Though we receive the report, this is **your** information to use—we do not contact your donor directly. I encourage you to call [donor name] and invite them to an in-person conversation about their interest in [organization]. As promised, I’ve enclosed some literature that we use to guide legacy giving which I encourage you to reference as you enter into this conversation with your donor. I’ve also enclosed a template letter to send them as a follow-up after your meeting.

If we can do anything to assist in this process, please do not hesitate to contact me at [phone number and/or email].

Sincerely,

[name]