



Grateful Dead: Stewardship in Planned Giving

Conversation Starters for Donor and Advisor Stewardship

With Donors:

- What inspired your decision to include us in your legacy plans?
- What would you like your gift to accomplish?
- Would you be open to sharing your story to inspire others?

With Advisors:

- How can we support your conversations about charitable planning?
- Would a co-branded toolkit or lunch-and-learn be helpful to your clients?
- Can we keep you informed of new charitable strategies or benefits?



Grateful Dead: Stewardship in Planned Giving Elements of a Strong Stewardship Program

Component Best Practice Example

Personalized Acknowledgment

Handwritten note or video from leadership within 72 hours of gift confirmation.

Donor Recognition

Newsletter feature, legacy society listing, or donor wall.

Ongoing Engagement

Invitations to exclusive events, behind-the-scenes tours, annual impact calls.

Family Inclusion

Birthday cards, memorial mentions, or donor family appreciation letters.

Advisor Engagement

Advisor appreciation events, toolkit for charitable planning, collaborative partnerships.

Impact Reporting

Annual report, infographics, testimonials, donor stories.



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Stewardship Calendar Builder

Use this as a guide to build a 12-month stewardship plan. Circle, check, or add dates relevant to your organization.

Month	Sample Stewardship Actions
January	<input type="checkbox"/> New Year letter from CEO or gift planning team.
February	<input type="checkbox"/> Valentine-themed gratitude message; legacy donor spotlight.
March	<input type="checkbox"/> Invite to spring donor appreciation lunch.
April	<input type="checkbox"/> Legacy Society newsletter or impact story email.
May	<input type="checkbox"/> Share student/family testimonials before fiscal year close.
June	<input type="checkbox"/> Advisor networking event or estate-planning webinar.
July	<input type="checkbox"/> Summer stewardship call check-ins.
August	<input type="checkbox"/> Mid-year report or donor impact postcard.
September	<input type="checkbox"/> Hispanic Heritage/Legacy Month legacy donor feature.
October	<input type="checkbox"/> Send holiday event invitations; family-focused engagement piece.
November	<input type="checkbox"/> National Philanthropy Day recognition.
December	<input type="checkbox"/> End-of-year gratitude campaign or “12 Days of Giving.”