

The Council for Health & Human Service Ministries

United Church of Christ

## 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?

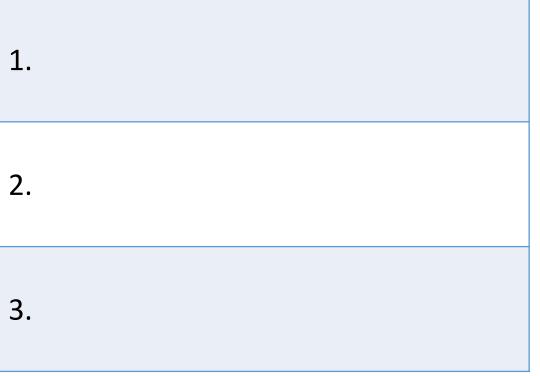


#### Where are you with fund development?

We are successful because:

We are not successful because:





## It Takes a Village

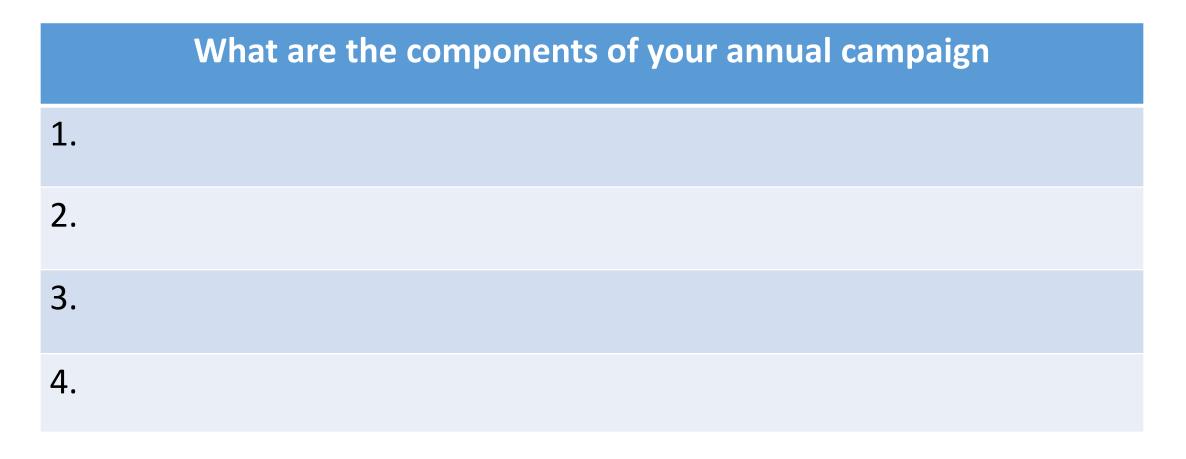
Who are your current fund development team mates?	
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.
6.	6.

#### 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 #



## 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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