



VOLUNTEERS – Volunteer Questionnaire

Use this Form when recruiting your Planned Giving Volunteer Committee

Volunteer Questionnaire

Date: _____

Name: _____

Volunteer Position: _____

How long have you been a volunteer with us? _____

Planned gifts are gifts made through a planning process i.e. financial or estate planning. The gift once made is usually received sometime in the future, upon the death of the donor. What future vision should we be presenting to prospective Planned Giving donors?

How do you think we should market the planned program to our donors?

How do you think we should market the planned giving program to our other stakeholders?

Would you assist us in promoting the Planned Giving Program through (tick all that apply):

- ☐ Suggesting prospective donors
- ☐ Contacting prospective donors
- ☐ Via a letter of introduction
- ☐ Telephone call
- ☐ Visit with staff person
- ☐ Willing to be featured in our newsletter as a donor who has included us in your Will and estate plans?