## Memo to Boss or Board

To: [Boss or Board]

From: [Enlightened Donor Centered Fundraiser]

Re: A Fantastic Future

Date: [Today]

We have a great opportunity to make a difference for our organization. With the right tools, we can secure major gifts from our donors who wish to donate part of their retirement plans to us. With your approval, I would like to add “Win-Win Gifts from Retirement Plans” to the next staff (or board) meeting agenda. Based on the demographics of our donor base and research from Giving USA, now is the time to market gifts from retirement plans.

I would like you (or the board) to consider the following budget of $\_\_\_\_\_\_\_ to get started and make this endeavor successful.

Attachments:

Case Statement

Budget

Retirement Plan Beneficiary Designation Toolkit from Planned Giving.com (optional purchase)