



YOUR ORGANIZATION'S NAME AND/OR LOGO HERE

Creating A Legacy: The Story Behind The Gift

The *(insert name of the individual or if appropriate the fund here)*

Why Gather This Information?

_____ receives a number of donations through estate gifts. In some cases, the gift is a surprise and, unfortunately, we may not be able to obtain information about the donors or the reasons underlying their generosity.

To properly recognize donors, we like to gather the “story behind the gift”. We keep this information, together with the terms of reference for how the donor wishes us to use this gift, on file. This way, we can ensure that those who receive the benefit of the gift will know a little about the donors and why they decided to establish their fund. When we receive the gift, this information will help us publicize the legacy and honour the donor in keeping with their wishes.

Helping us Create *Your* Legacy

That brings us to your gift and our desire to have your story on file. We understand how difficult it might be to choose what information to include, so a few suggestions are provided on the attached outline, as a guide. Please answer only those you wish to and feel free to add your own comments. Providing point-form notes, clippings or biographies from other sources is also helpful. If you prefer, we can set up a meeting, at a time and place convenient to you, to ask some questions and record your answers.

Once we receive this information, we will write a draft for you to review. When you are comfortable with the information, we will ask for your signed approval before placing it in your file. We understand that your story may change over the years and we encourage you to update your story periodically. If your legacy honours more than one person, please provide information for each person. If you prefer not to supply any information, we will respect your wishes.

_____ appreciates your thoughtfulness in considering a donation and looks forward to working with you to recognize this.

*“The greatest thing this generation can do is to
lay a few stepping-stones for the next generation.”
Charles F. Kettering*

The *(insert name of the individual or if appropriate the fund here)*

Section One: The motivation behind your gift.

What you would like others to know about why you've decided to establish this gift to _____.

Section Two: Profile *(Please complete a separate profile for each person being honoured)*

1. Profile: Brief Life History *(for example...)*

- a. Place and date of birth
 - b. Schools, Colleges, attended, etc.
 - c. Work experience
 - d. Places you've lived.
 - e. Favourite places you've visited
 - f. Other
2. Information on family, parents, children, etc.
 3. Hobbies, Interests, Pets and other important things in your life.
 4. Accomplishments you're most proud of.
 5. The reasons you have chosen to support education.
 6. Other things you'd like to share:
 - a. favourite (books, musicians/songs, art, etc.)
 - b. advice you'd pass along to young people
 - c. those who influenced you in your life – and why?

Section Three: Photographs:

I'm sure you've heard the saying *a picture is worth a thousand words*. Therefore, we would appreciate it if you could select a photo or two that we can use to accompany your story. We will be very careful with your original photos; they will be scanned and sent back to you promptly. The scanning process will not harm your photographs.

Section Four: Permission to Share Your Story

By way of your signature, please let us know that we have your permission to share your story.

Name

Date