

PRM Name:
Donor Name:
Fund Type(s):
1. Welcome Packet Sent 2. PRM Welcome Call or Meeting Completed? Welcome Call Welcome Meeting
 DISCUSSION QUESTIONS FOR WELCOME CALL OR MEETING A. How often would you like a personal check-in regarding your fund? (suggest 1- 2 times per year) Would you prefer the check-in be by phone or a meeting? Is there a particular time of year that is best for you? Would you like us to provide a summary of your giving and the activity of your fund at this meeting? (Show Individualized Donor Report, if possible)
B. Would you like invitations to events? What types of events would interest you? (Provide examples of some of the events we offer and how often they occur)
C. If Legacy Donor, ask if they would like to be a part of the Legacy Society. The Legacy Society involve invitations to annual events, special newsletters, and recognition.



4. Log any actions in RE.

D.	Would you like to follow us on social media? We update our accounts daily. (Facebook, Twitter, Instagram, Linked In, YouTube?)
E.	 What are your areas of philanthropic interest? (Utilize Giving Guide if possible. If we already know their areas of interest, ask if they have any others.) For DAFs and FFs, ask if they would be interested in receiving funding opportunities from us in their areas of interest
F.	Walk donor through how to use online portal, if they wish.
G.	Additional Comments?
3.	Send completed checklist to Donor Relations Coordinator.

5. Donor Relations Coordinator Attach Checklist to constituent record.