

- 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.
 4. Log any actions in RE.
 5. Donor Relations Coordinator Attach Checklist to constituent record.