

# Legacy Gift Planning Program

## WHAT IS A CHAMPION?

### A Champion Engages Internal Stakeholders

This is vital to the program's success! The right Champion will work with key leaders to identify donors to invite to participate in the program. They'll advocate for the program, get buy-in from leaders at all levels, and bring together people and resources to make it a success. A Champion is often a "people person," organized, and well-connected in the community.



### A Champion Maintains the Meeting Schedule

A Champion works with Apex to select regular meeting dates that work for both organizations. Once those are set, they will be responsible for filling the consultant's time with one-on-one gift planning meetings, typically 4 or 5 per day of consulting. Some choose to use a sign-up software like Doodle or Google Sheets to make this easier.

### A Champion is CWO (Chief Welcoming Officer)

Make sure there's a comfortable, private, well-lit space for meetings to happen. Consider providing bottled water, pens and paper, or light snacks to make it an even more positive experience. Or, if meetings are happening remotely via video conferencing, make sure donors have the link they need and know how to connect. You'll have regular check-in meetings with your legacy consultant so you'll know how things are going.



### A Champion Provides a Familiar Face

Apex provides expertise, but the Champion maintains relationships. After all, this program is a gift to donors from your organization! You'll join the first few minutes of each meeting and check in with donors afterwards and throughout the month. Because of these connecting points, many Champions report hearing incredible stories of how the program has made a huge difference in people's lives and legacies.

### A Champion Celebrates Milestones

You'll receive quarterly, anonymous reports of where donors are at in the gift planning process and whether any have chosen to remember your organization in their legacy plan. You'll be able to share concrete numbers illustrating the difference the program is making on the mission and long-term sustainability of your organization.

