

Planned Gifts: How Donor Relations Intersect with Client Services



WENDY COE AND JOHANNA ALLEX

**WISCONSIN PLANNED GIVING COUNCIL
MARCH 4, 2014**

General Thoughts/Ideas



Interaction with the Donor

- Contributions
- Communication
- Social/Electronic Communication
- Internal Recordkeeping
- Relationship Building



General Thoughts/Ideas (cont.)



Upon Death of the Donor

- Responsiveness
- Documentation
- Family Interaction
- Follow Up



Donor Profile



Meet Zach Johnson



Donor Profile



Meet Elizabeth Smith



Planned Gifts: How Donor Relations Intersect with Client Services



THANK YOU!

Wendy Coe, Executive Director
American College of Veterinary
Pathologists
2424 American Lane
Madison, WI 53704
608-443-2466, ext. 149
wcoe@acvp.org

Johanna J. Alex
Christenson and Alex, LLC
2997 Yarmouth Greenway Drive
Fitchburg, WI 53711
608-273-8609
johanna@christensonalexlaw.com