



Strictly for the Smaller Private School

Beneficiary Designations Website and Toolkit

SIGN-UP FORM
PLANNED GIVING WEBSITE
& OUTREACH



Beneficiary Designations Planned Giving Website and Outreach: \$2,995 plus \$295 setup for the website.

Features include but are not limited to:

ONLINE MARKETING TOOLS	PRINT MARKETING TOOLS*	TEAM BUILDING & EDUCATION
Planned giving website	Postcard templates (2) <i>over 5 variations</i>	Pocket Guides for fundraisers (3)
100% Branded	Display ad template (2) <i>over 5 variations</i>	Pocket Guides for board members (3)
Gift plans covered include:	Bequest solicitation letters	Gift comparison charts (10)
• <i>Bequests, Cash, CDs</i>	Bequest follow up letter 1	One hour marketing consultation
• <i>Appreciated Securities</i>	Bequest thank you letter 2	Estate Planning Toolkit (on website)
• <i>Stocks/Investments Fund Accounts</i>	Bequest thank you letter 3	
• <i>United States Savings Bonds</i>	General solicitation letter	
• <i>Bank Accounts/Joint Accounts</i>	Letter from CEO/VP	
• <i>Life Insurance</i>	Estate planning "touch piece"	
• <i>IRAs</i>	Intention form	
Bequest Video	Sample marketing plan	

*All print materials are in a template format to be customized by you. Your designer or print shop needs to have Adobe InDesign and MS Word.

"THE FINE PRINT"

- Your 3-page Beneficiary Designations Website is customized with your *brand*, name of organization, and TAX I.D. number.
- Editorial revisions are possible only on the home page.
- Our websites are all copyrighted. Your license for the website is for a period of 3 years. *You agree not to copy the website to any other server or host it by anyone else during or after the term of this agreement.*
- The Print and Team Building tools are copyrighted as well.
- You can use them *indefinitely*, and alter them as often as you wish, as long as it is used within your organization only.
- If your institution ever revamps its branding, we can re-design your website to match. A \$500 fee applies to cover expenses.
- After 3 years, you can upgrade your website as your program grows, just renew, or cancel. Website renewal costs \$495/year.
- Credit card payments only.

Please call to sign up! Or, just complete this form and fax or email. For security reasons, do not fax your credit card information. We will call you. Thank you!

NAME

ADDRESS 2

TITLE

CITY

STATE

ZIP

ORGANIZATION

NAME (Considered Signature)

ADDRESS 1

DATE

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