Testimonial Letter

Send this as a letter to your donor(s) and use also as the guideposts for a follow-up phone call with the donor. The questions are merely prompts; there’s no need to answer them all.

[ORGANIZATION NAME]

Address 1 • Address 2 • City • State • Zip

Dear [DONOR’S NAME]

We are grateful to you for making a thoughtful, farsighted gift in support of our mission, and we would like to recognize your generosity by featuring you as a special donor [on our website, in our newsletter, or wherever you will post the testimonial]. We believe your story will help inspire others to follow your kind and generous example by making their own legacy gift.

Please share your story, including your personal reasons for choosing [ORGANIZATION NAME] as the beneficiary of your generosity. We hope the questions below will help you to share your thoughts and comments. Pick and choose the ones that speak to you.

What inspired you to become a donor to [ORGANIZATION NAME]?

When you think of [ORGANIZATION NAME], what key words or phrases come to your mind?

(1)

(2)

(3)

What aspect of [ORGANIZATION NAME]’s work gives you the most satisfaction?

What was the single most important consideration in your decision to make a legacy gift to [ORGANIZATION NAME]?

Is there an important moment, person or special occasion at [ORGANIZATION NAME] that influenced your decision?

What prompted you to make your gift at this particular time?

What result/impact/outcome do you hope your gift will achieve for [ORGANIZATION NAME]?

You may write your testimonial in the space provided below. Feel free to make it as long as you wish. Use additional sheets if needed. If you wish, we can use your answers to draft a testimonial for you. We will provide a draft for your approval. Let us know which approach you prefer.

Please confirm the way you wish your name to appear in all recognitions:

Thank you for sharing your thoughts and for your willingness to encourage others to be generous as well. To complete the process, please sign below, granting us permission to publish your information on our website. We look forward to staying in touch with you as a leading member of the community of donors who support our important work.

Sincerely,

[NAME AND TITLE OF ORGANIZATION REPRESENTATIVE]

WAIVER/APPROVAL

I hereby grant {ORGANIZATION NAME} permission to use my testimonial along with my name and picture on {ORGANIZATION NAME} planned giving website:

Print Name Date

Signature