**Checklist for Starting a Basic Planned Giving Program**

* Base of individual donors who have given annually for at least three consecutive years
* Fundraising database
* Planned giving case for support
* Board has adopted policies
* Gift acceptance
* Use of planned giving funds
* Investments
* Bequest language
* Legacy society established
* Organizational leaders make planned gifts
* Pro bono advisors secured
* Existing donor communications vehicles to encourage planned gifts