

Building a Bequest Program



Date

Friday, 27 November 2009

Time

8.45 am to 1.00 pm

Venue

Hilton Hotel
488 George Street, Sydney

Cost

\$450.00 (incl. GST)

Morning tea, lunch and
course notes included

How to set up, administer and grow bequest programs for charities

Presenter

Presenter **Yvonne Chandler**, Bequest Officer of The Fred Hollows Foundation, has had more than 9 years' experience as a bequest officer for two large charities.

Outcome

This half-day workshop provides you with a practical, step-by-step overview on how to establish, administer and grow a bequest program including:

- Identifying your organisation's key messages
- Developing a marketing plan
- Communicating with donors
- An introduction to legal requirements
- Recording and reporting bequests
- Working with limited resources

Who should attend?

- Bequest officers
- Fundraisers

This workshop is essential for charities who want to know how to set up a bequest program, as well as those who have already established a program and wish to develop it further.

Register your place now!

To secure your place at this workshop, complete the registration form overleaf and return it to Makinson & d'Apice, Lawyers.

MAKINSON & d'APICE
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in association with



**The Fred Hollows
Foundation**

www.hollows.org.au

Where are you now?

- Level of your program
- Your personal preferences
- How to make do with limited resources (eg expenditure)
- How to negotiate with your superior for growth in your expenditure

Your key messages

- Inspiring your donors
- Where and when to use your key messages
- Listening to your donors

Your marketing plan

- Donor care and relationships
- Promotion – internal and external
- Primary focus
- What can I use?

Your materials

- Responding to inquiries or confirmations
- Brochure/package concepts
- Tell your stories
- Let's letter write – acknowledgement and individual needs

The basics

- Steps for winning
- Steps for managing notifications and income received
- Who am I influencing?

Growing your legal knowledge

- Steps you need to know
- Legal letter writing – from the experts

Your measurement for bequests

- Create a recording mechanism to measure your success
- Reporting details as required

Are there any additional questions or topics you would like included in this seminar?

Registration form

Name: _____

Company: _____ Role in organisation: _____



Address: _____

Phone: _____ Mobile: _____

Email: _____

Payment options

- Please debit my credit card for \$450.00 OR I enclose a cheque for \$450.00 made payable to Makinson & d'Apice

Card type (please circle):  

Cardholder: _____ Signature: _____

Card number: _____ Expiry date: ____ / ____ Security code: _____

Billing address: _____

Please return your completed registration form to:
Building a Bequest Program, Makinson & d'Apice, GPO Box 495, SYDNEY NSW 2001
or by email to amak@makdap.com.au or by facsimile to 02 9233 9149