



Prospective Client Questionnaire

Stewardship Advocates

Endowment Program

PROSPECTIVE CLIENT INFORMATION - PERSON SUBMITTING THE FORM

Name

Title

E-mail

Phone

Position

PARISH OR ORGANIZATION INFORMATION

Name of parish or organization

Address

website URL

Number of pledging households

Additional affiliated households

Annual parish budget

Length of time priest or
executive director in place?

Describe any additional staff.
Full or part time?

Does an established endowment
already exist?

What is your history regarding
bequests to the parish?

Is there an existing planned
giving program?

Are there attorneys specializing
in trusts and estates in your
parish or organization?

Where does your governing
board or parish council stand on
this proposed initiative?

Who is leading this initiative?

Ideally, when would you want to start?

OTHER SERVICES?

An endowment program may be the present highest priority, but any interest in other strategies of organization development?

- | | |
|-----------------|---|
| Services | capital campaign |
| | board development |
| | volunteer management |
| | personal coaching for leadership |
| | personal coaching for management |
| | strategic planning |
| | an ongoing major gifts program |
| | church growth/evangelization |
| | stewardship or annual giving program |

Tell us about any other services you may need and how we can best serve you:

Description

HOW DID YOU HEAR ABOUT US?

- | | | |
|---------------|-------------------|---------------------|
| Method | referral | e-newsletter |
| | web search | Twitter |
| | LinkedIn | Facebook |
| | other | |