

Engagement Letter for Legacy Gift Planning Sessions

Date: [Insert Date]

Dear [Recipient's Name],

We are excited to engage with you in planning your legacy gift. Your willingness to consider a contribution to [Organization's Name] is truly appreciated, and we want to ensure that your philanthropic goals are met.

During our sessions, we will explore options that align with your values and financial objectives. Our team is here to provide you with the knowledge and support necessary to facilitate an impactful gift.

Our sessions will cover:

- An overview of the various types of legacy gifts
- Tax implications and benefits of gifting
- Personalized strategies for incorporating your legacy gift into your estate plan
- Answering any questions you may have

We look forward to working with you and helping you create a lasting impact. Please confirm your availability for our first session by [Insert Confirmation Date].

Thank you for considering a legacy gift to [Organization's Name].

Warm regards,

[Your Name]

[Your Title]

[Organization's Name]

[Contact Information]