

Legacy Donor Stewardship Guide

Building meaningful, lasting relationships with planned giving donors

Planned and legacy donors represent one of the deepest expressions of commitment to your organization's mission. They have made a decision to invest in the future you are helping to create. Because of this, stewardship of legacy donors is fundamentally different from traditional donor engagement.

It is not about frequent asks, campaigns, or transactional updates. Instead, it is about:

- **Honoring values and intention**
- **Creating a sense of belonging**
- **Reinforcing long-term impact**
- **Building a relationship rooted in meaning, not urgency**

When done well, legacy stewardship helps donors feel:

"I am part of something enduring—and my values will live on through this work."

It also has a powerful secondary effect: engaged legacy donors are often among your most loyal annual supporters, advocates, and ambassadors.

This guide provides some simple ideas and a sustainable framework your organization can use to steward legacy donors with care, consistency, and authenticity.

Legacy Donor Stewardship Checklist

We're sharing lots of ways you can ensure your legacy donors feel valued, connected, and meaningfully engaged. Pick and choose those that you think will work best for your organization and donors.

Welcome & Foundation

Establish a strong, values-based relationship from the beginning.

- ☐ Send a personalized welcome letter (warm and human, not overly formal)
- ☐ Provide a small, meaningful welcome gift (mission-aligned)
- ☐ Invite them to join your legacy society
- ☐ Capture donor preferences (recognition, communication, interests)

Personal Connection

Prioritize genuine human relationship-building.

- ☐ Make at least one personal thank-you call annually
- ☐ Send 2–3 handwritten notes per year (milestones or “thinking of you”)
- ☐ Invite donors to share their “why I give” story
- ☐ Offer light-touch connection with staff or community members

Engagement with Your Mission

Help donors feel like insiders to your work.

- ☐ Share 2–3 behind-the-scenes updates annually
- ☐ Provide impact stories that highlight long-term change
- ☐ Invite donors to **mission-related experiences**, such as:
 - Field visits, guided hikes, or site tours
 - Small gatherings, talks, or virtual events

Legacy-Focused Stewardship

Honor the long-term nature of their commitment.

- ☐ Conduct periodic “legacy intention” check-ins (every 2–3 years)
- ☐ Invite donors to share values, hopes, or intentions for their gift
- ☐ Offer optional legacy storytelling or letter-writing opportunities

Annual Rhythm Check

Keep your program simple and consistent.

- ☐ 2–3 personal touches completed
- ☐ 2+ insider or impact updates shared
- ☐ 1–2 invitations to events or experiences
- ☐ 1 meaningful recognition or gratitude moment delivered

Sample 12-Month Stewardship Calendar

This sample calendar offers a balanced, sustainable cadence. Adjust based on your organization's capacity and donor preferences.

January – Warm Start

- New Year gratitude message
- "Year ahead" insider update from leadership

February – Personal Touch

- Handwritten note or appreciation message
- Optional invitation to share their story

March – Mission Connection

- Behind-the-scenes program or staff update

April – Experience Invitation

- Invite to spring event (site visit, talk, or virtual gathering)

May – Meaningful Gift

- Send a mission-aligned gift
(*e.g., art print, seeds, symbolic item*)

June – Mid-Year Check-In

- Personal call or email check-in
- Keep tone relational, not evaluative

July – Insider Update

- Share a deeper impact or long-term vision story

August – Community & Belonging

- Invite to small gathering (virtual or in-person)
- Highlight community of legacy donors (if appropriate)

September – Legacy Reflection

- Optional invitation to reflect on legacy intentions
- Share gentle estate or legacy resource

October – Signature Experience

- Invite to a special event
(e.g., conservation walk, restoration day, expert talk)

November – Gratitude Moment

- Thanksgiving message
- Optional short video or message from staff/community

December – Year-End Recognition

- Annual impact reflection (“The future you’re helping create”)
- Recognition (if desired)
- Share annual report or publication

Final Thought

Legacy stewardship does not need to be complex or resource-intensive to be effective.

What matters most is:

- Consistency
- Authenticity
- A focus on meaning over marketing