



Questions to Learn More About the Donor (General)

Ask Topic: Getting to Know Your Donor (Beyond the Bio)

- In thinking about e-mail, the telephone, written correspondence, face-to-face meetings, social media, and so on— how would you describe your communication style and preferences?
- What would you like to be remembered for?
- What has brought you the most fulfillment in your life?
- Who have been influential role models or mentors to you?
- What is the most difficult question you have ever been asked?
- What is the greatest achievement in your life?
- What was the happiest day of your life?
- What's the most memorable book (movie, concert, etc.) you have ever read?
- What were your greatest lessons from your family?
- How did where you grow up influence your life?
- What lights a fire in you?
- What inspires you?

Ask Topic: Defining Interests & Passions

- What are you most passionate about in your life right now?
- What are the most important things you'd like to accomplish this year?
- If you had a couple of extra hours in the week, what would you spend them on?
- How do you feel we can most effectively serve our community?
- How did you come to the decision to give your first gift?
- What is it that we do that first caught your interest?
- What inspired you to decide to invest in our organization?
- What makes you continue to give?
- What story do you remember the most from our organization?
- Why is our organization important to you?
- What do you like most about our organization?
- What would you like to see changed or improved?
- Why are you involved with our organization?
- Of all the programs and services that are provided through your gift, what is one that really calls to your heart?
- Of all the gifts you have given, what is one that comes to mind that brought you the most joy?
- Do you see yourself making a big splash in the community and solving a large problem? (For gift size and importance)
- When you think about your philanthropic impact, are you more interested in going wide or going deep?

Ask Topic: Increase Connection & Understanding of Organization

- How do you want to be involved?
- What would you like to know about us?
- If you were to tour a project what do you want to learn most about?
- What event most interests you to attend?
- Is there a volunteer opportunity that has caught your eye?
- What do you feel is the most important thing that our organization solves?
- Is there a common theme with your giving?
- How do you and your spouse come to make a decision on who and what you give to?

Questions Related to Asking/Preparing for a Gift**Ask Topic: Preparing to Ask**

- Can you walk me through your decision-making process?
- What is important to you as you make decisions to give?
- How do you like to be told about the results of your gift?
- Am I doing an effective job at linking our work to your key priorities?
- What have I done that has been most helpful to you?
- In what ways am I helping you to achieve your goals?
- What thank you from our organization has meant the most to you?
- How do you feel about our organization?
- What is the best way to get your attention with the material we sent?
- You stopped giving to our organization. Why? How have we disappointed you?
- Would you be open to a proposal on what an investment into that area would look like for you? (asking for the visit to ask)

Ask Topic: Discussing Proposal

- What parts of the presentation will be most valuable for us to emphasize and spend time on?
- Can you restate, in your own words, what you hope to gain from successful completion of this program?
- Given what we've set out in our proposal, and thinking about value to you, can you say something about what you'd like to see less or more of?
- What aspects concern you?
- In what way did this capture what you are trying to accomplish?

Ask Topic: Donor's Response is Not to Give

- Tell me more about your decision.
- What has led to your decision that we have either done or not done?
- What are the key factors that influenced you in making this decision?

- Are you open to discussions in the future about other giving opportunities?
- What timing would best work for us to come back with projects in the future?

Ask Topic: Say "Maybe" to a Request to Give

- What questions are still unanswered for you?
- What concerns to you have?
- What do you still need to be able to decide?

Questions Related to Planned Giving

Ask Topic: General Planned Giving Questions

- What kind of impact do you hope to ultimately have on our work at ORG?
- What is your vision for how you and your family can advance our work to INSERT MISSION?
- All circumstances aside, what would you like to see achieved through your giving to ORG?

Ask Topic: Learning About Donor's Business

- Tell me more about your business... how did you start it?
- Tell me exactly what it does?
- How is it managed? Is it a corporation, or a partnership, or solely owned?
- If co-owned with others, who are the other owners?
- (Family Owned) Would you mind sharing history of your company? What are your future plans for it?

Ask Topic: Learning About Donor's Investments

- Tell me a little about your investing; how did you get started? How long?
- What types of investments do you work with? Is there real estate?
- Are you concerned about high taxes? Capital gains taxes?
- What kind of retirement funds do you have; I can show you a great way to use some types of funds to make more effective gifts