
Gifts in Wills CRM & Stewardship Framework

A practical framework to help you track Gifts in Wills supporters, strengthen stewardship and manage relationships over time.

Prepared for:

The Ripple Effect Foundation

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 View GiW Supporter Communication Templates here >

WHY THIS FRAMEWORK EXISTS

This framework is designed to help The Ripple Effect Foundation manage Gifts in Wills activity in a **simple, practical** and **sustainable** way.

It provides a straightforward approach to tracking supporters, planning stewardship and improving visibility over time.

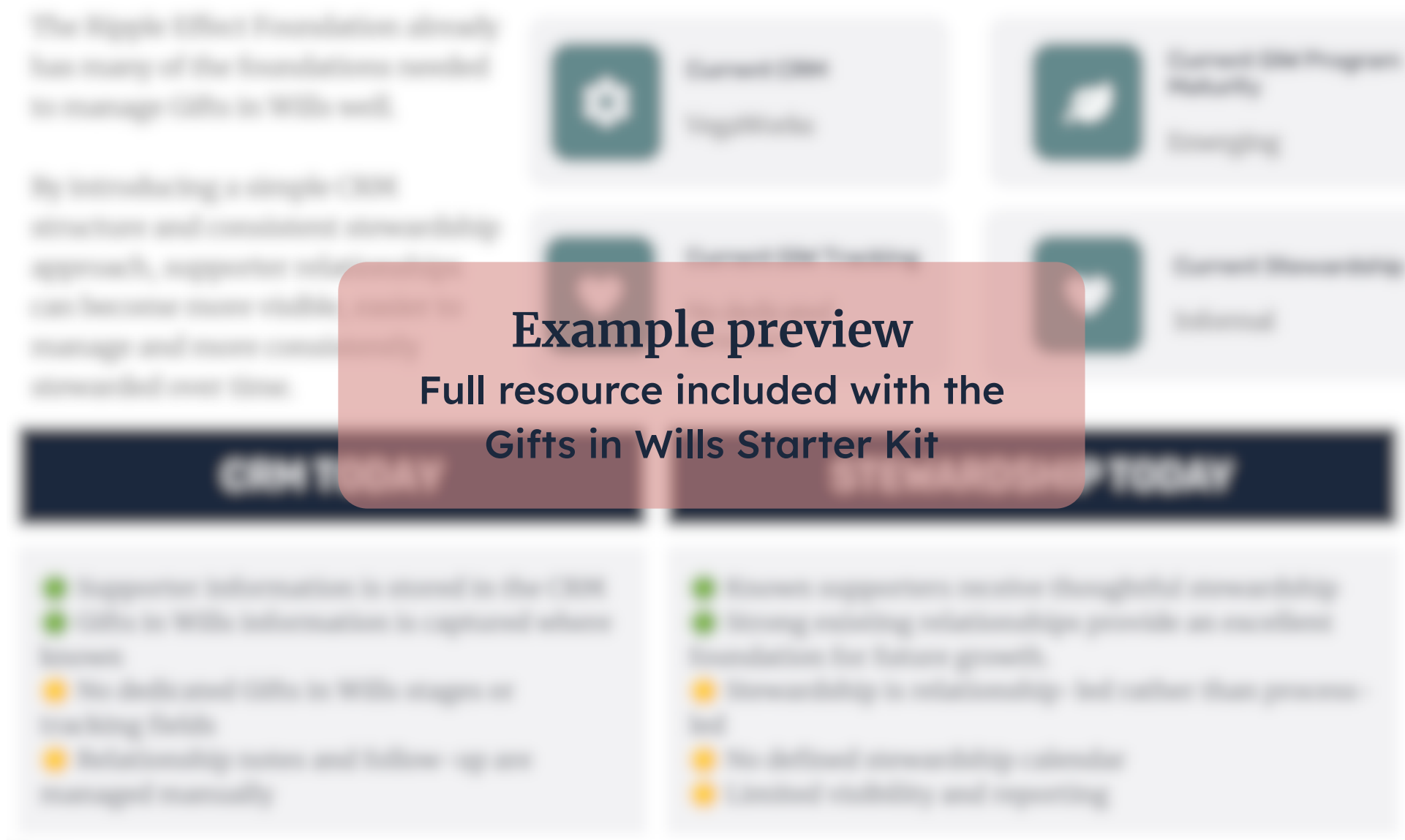
This framework will help you:

- ✓ **Record and track** Gifts in Wills enquiries and known supporters
- ✓ **Keep supporter information organised, accessible and up to date**
- ✓ **Plan meaningful, timely stewardship** and follow-up for every supporter
- ✓ **Improve reporting, visibility and continuity** of supporter relationships over time
- ✓ **Reduce reliance** on memory, spreadsheets and manual tracking processes

CURRENT CRM & STEWARDSHIP SNAPSHOT

The Ripple Effect Foundation already has many of the foundations needed to manage calls to Wills well.

By introducing a simple CRM structure and consistent stewardship approach, supporters can be better managed and more engaged over time.



CRM TODAY

- Supporter information is stored in the CRM
- Calls to Wills information is captured where needed
- No dedicated calls to Wills pages or tracking fields
- Relationships are not followed up or managed manually

STEWARDSHIP TODAY

- Stewardship is not a structured activity
- Stewardship is not a consistent activity
- Stewardship is not a consistent activity
- Stewardship is not a consistent activity

YOUR PRIORITIES AT A GLANCE

YOUR PRIORITY IS TO:

- ✓ Set up a small Gifts in Wills register in your CRM
- ✓ Record known supporters and enquiries in one place
- ✓ Use clear stages to track where each supporter sits
- ✓ Add next stewardship actions so follow-up does not get lost
- ✓ Send regular stewardship touchpoints
- ✓ Review the register once a quarter

YOU DO NOT NEED TO:

- ✗ Build a complex CRM workflow
- ✗ Create a separate stewardship program from scratch
- ✗ Add dozens of new data fields
- ✗ Contact supporters constantly
- ✗ Capture every supporter interaction
- ✗ Wait until everything is perfect before getting started

THE FIVE QUESTIONS TO FOCUS ON FIRST



A well-managed Gifts in Wills CRM should make it easy to answer these five questions:

- 1 Who has enquired about leaving a gift?
- 2 Who has indicated they intend to leave a gift?
- 3 Who has confirmed they have left a gift?
- 4 What should happen next?
- 5 When were they last contacted?

If you can answer these five questions at any time, you're already well on your way to managing Gifts in Wills relationships consistently.



RECOMMENDED GIFTS IN WILLS SUPPORTER JOURNEY

Supporters typically move through a series of stages before a legacy is realized. Understanding these stages helps organisations engage meaningfully and reward supporters at the right time. These five stages provide a simple way to track where each supporter is in their gifts in Wills journey.



Example preview
Full resource included with the
Gifts in Wills Starter Kit

MANAGING GIFTS IN WILLS SUPPORTERS

Use this simple workflow whenever someone enters or progresses through your Gifts in Wills journey.

1. Complete the right core CRM fields
2. Update their Gifts in Wills stage
3. Record the next stewardship action
4. Upload any Trust correspondence or supporting documents

Don't worry if you don't have every detail. Record what you know now and update the information over time.



Example preview
Full resource included with the
Gifts in Wills Starter Kit



Enquiry

When someone enquires

- Set stage to Enquiry
- Send Enquiry communication, add date
- Update next stewardship action



Considering

When someone is considering a gift

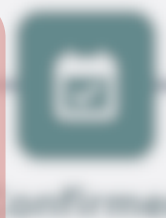
- Set stage to Considering
- Send Considering communication, add date
- Update next stewardship action



Intending

When someone intends to make a gift

- Set stage to Intending
- Send Intending communication, add date
- Update next stewardship action



Confirmed

When someone makes a gift

- Set stage to Confirmed
- Send Confirmed communication, add date
- Update next stewardship action and add to annual stewardship calendar

EXAMPLE GIFTS IN WILLS CRM RECORD

This example shows how a Gifts in Wills supporter record might look once the recommended CRM fields have been completed.

Life Education Trust

LM

Contacts

Timeline

Notes

Tasks

Emails

Reports

Settings

Help

Margaret Thompson

Supporter ID: 00012587

margaret.thompson@email.com

0412 345 678

Christchurch, NZ

Edit Record

Add Note

Record Owner:

Michael Stanley

Last Updated:

20 May 2025

Gifts in Wills – Core CRM Fields

1. Gifts in Wills Stage

Confirmed

Confirmed they have included Life Education Trust in their Will.

2. Source

Brochure request via website

April 2024

3. Relationship Owner

Michael Stanley

4. Last Stewardship Contact

12 March 2025

Birthday card sent

5. Next Stewardship Action

Send impact update

Annual impact email

6. Next Stewardship Action Date

30 June 2025

7. Recognition Preference

Prefers to remain anonymous

Does not wish to be publicly recognised.

8. Relationship Notes

Passionate about helping children in our community. Values privacy. Enjoys receiving impact stories.

Relationship Notes

Margaret first enquired about leaving a gift in her Will in April 2024 after reading our brochure.

She has since confirmed she has included Life Education Trust in her Will.

She is very private and prefers not to be acknowledged publicly.

She is particularly interested in the impact her gift will have on children in our local communities.

Engagement Summary

4 Emails Sent

Last: 12 Mar 2025

2 Cards Sent

Last: 12 Mar 2025

1 Phone Call

Last: 10 Sep 2024

1 Event Invite

Last: 15 Oct 2024

Tags

Major Donor

Legacy Supporter

+ Add Tag

Future Impact COLLECTIVE

CRM & Stewardship Framework – The Ripple Effect Foundation (Example Resource) | Future Impact Collective 10

RECOMMENDED STEWARDSHIP JOURNEY

Thoughtful stewardship is built through meaningful, well-timed communication. The recommendations below provide a simple approach for each stage of the Gifts in Wills journey.

During the person's lifetime:

Gifts in Wills Type	Goal	Suggested Annual Stewardship Activities
Individual	Build a relationship with the donor	1. Annual stewardship report
Corporate	Build a relationship with the donor	1. Annual stewardship report
Foundation	Build a relationship with the donor	1. Annual stewardship report
Trust	Build a relationship with the donor	1. Annual stewardship report
Legacy and Endowment	Build a relationship with the donor	1. Annual stewardship report 2. Stewardship report to be used in annual and biennial reports 3. Stewardship report to be used in annual and biennial reports 4. Stewardship report to be used in annual and biennial reports 5. Stewardship report to be used in annual and biennial reports 6. Stewardship report to be used in annual and biennial reports

Example preview
Full resource included with the
Gifts in Wills Starter Kit

EXAMPLE 12-MONTH STEWARDSHIP JOURNEY

A simple stewardship approach

This example shows how a confirmed Gifts in Wills supporter might be stewarded over a 12-month period.

Rather than creating a separate stewardship program, build on existing supporter engagement activities you already have and add one or two personalised touchpoints throughout the year.



Existing supporter engagement activities:

- ✓ Quarterly newsletters
- ✓ Annual supporter event

Plus two additional Gift in Will touchpoints per year:

- ✓ Personal annual check-in
- ✓ Christmas card or year-end thank-you



Margaret Thompson

CONFIRMED GIFTS IN WILLS SUPPORTER

This calendar shows an example of planned stewardship activities for Margaret over the next 12 months.



Thank you for building a legacy of hope.

CRM SUMMARY



Stage
Confirmed



Relationship Owner
Michael Stanley



Recognition Preference
Prefers to remain anonymous



Preferred Contact
Email



Next Action
Send Newsletter



Next Action Date
28 May 2026

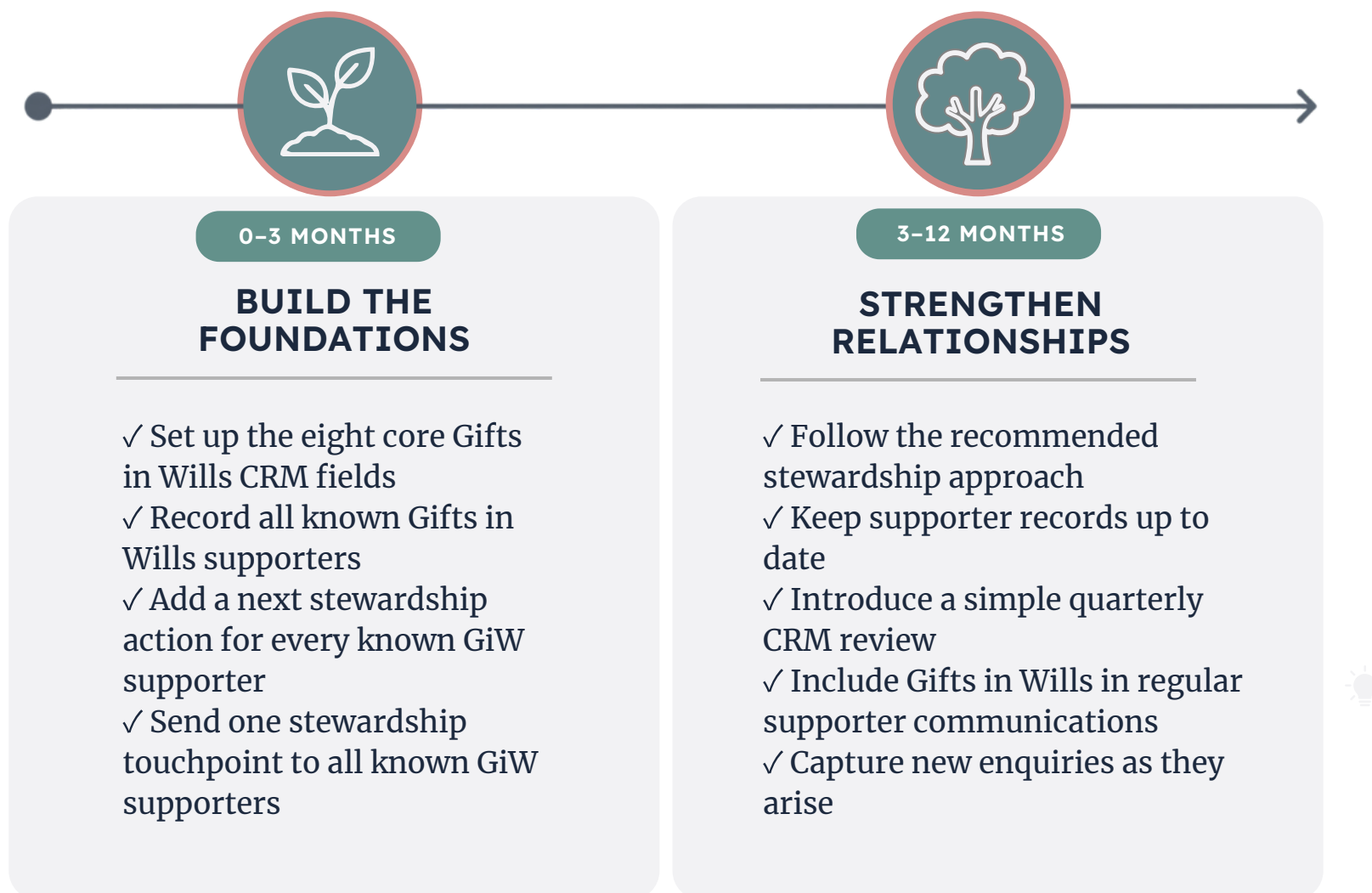


Notes
Values privacy and the impact her gift will have on children in our local communities.

MONTH	STEWARDSHIP ACTIVITY	PURPOSE	STATUS
FEBRUARY	Newsletter Send our quarterly newsletter with updates and impact stories.	Keep Margaret informed and connected with our mission and impact.	✓ Scheduled 28 Feb 2026
MARCH	Personal Check-In Call Phone Margaret for a personal check-in and thank her for her support.	Maintain a personal connection and answer any questions.	✓ Scheduled 20 Mar 2026
MAY	Newsletter Send our quarterly newsletter with updates and impact stories.	Keep Margaret informed and connected with our mission and impact.	✓ Scheduled 28 May 2026
JUNE	Invitation to Supporter Event Invite Margaret to an upcoming supporter event (in person or online).	Deepen engagement and strengthen her connection with our mission.	✓ Scheduled 20 Jun 2026
AUGUST	Newsletter Send our quarterly newsletter with updates and impact stories.	Keep Margaret informed and connected with our mission and impact.	✓ Scheduled 28 Aug 2026
NOVEMBER	Newsletter Send our quarterly newsletter with updates and impact stories.	Keep Margaret informed and connected with our mission and impact.	✓ Scheduled 27 Nov 2026
DECEMBER	Christmas Card / End of Year Thank You Send a Christmas card and personal thank-you to close the year.	Express gratitude and warm appreciation for her ongoing support.	✓ Scheduled 18 Dec 2026

YOUR 12-MONTH IMPLEMENTATION ROADMAP

Focus on a few practical improvements at a time. Small, consistent steps will build a stronger Gifts in Wills program over the next 12 months.



FINALLY..PROGRESS MATTERS MORE THAN PERFECTION!

Example preview
Full resource included with the
Gifts in Wills Starter Kit

Ready to build a more structured approach to Gifts in Wills?

The full CRM & Stewardship Framework is included in the Future Impact Collective Gifts in Wills Starter Kit.

