GIFT MAXIMIZATION PROCESS | TamarFink WEALTH IMPACT

Discovery driven initiatives designed to gain necessary insight on non-profit's charitable purpose and how Tamar Fink can serve fundraising goals and expand creative offerings.

- *Evaluate charitable goals*
- *Thorough review of current charitable program*
- *Presentation of TF capabilities*

After interviewing the non-profit and understanding their culture, campaign goals, and overall mission, Tamar Fink will review all that has been done thus far and propose strategies to market and educate moving forward.

- *Keep same*
- *Make adjustments*
- *Add options*

Upon board approval, Tamar Fink completes orientation/training curriculum for all program staff. Training sessions conducted (WebEx or in-person) for:

- *Advancement/Development Staff*
- *Major Gift Team*
- *Board Members*
- *Committee Members*
- *Planned Giving Team*

OPTIONAL:
Comprehensive marketing audit of existing charitable gifting marketing toolkit

- *Media and marketing material review*
- *Print collateral and communication materials*

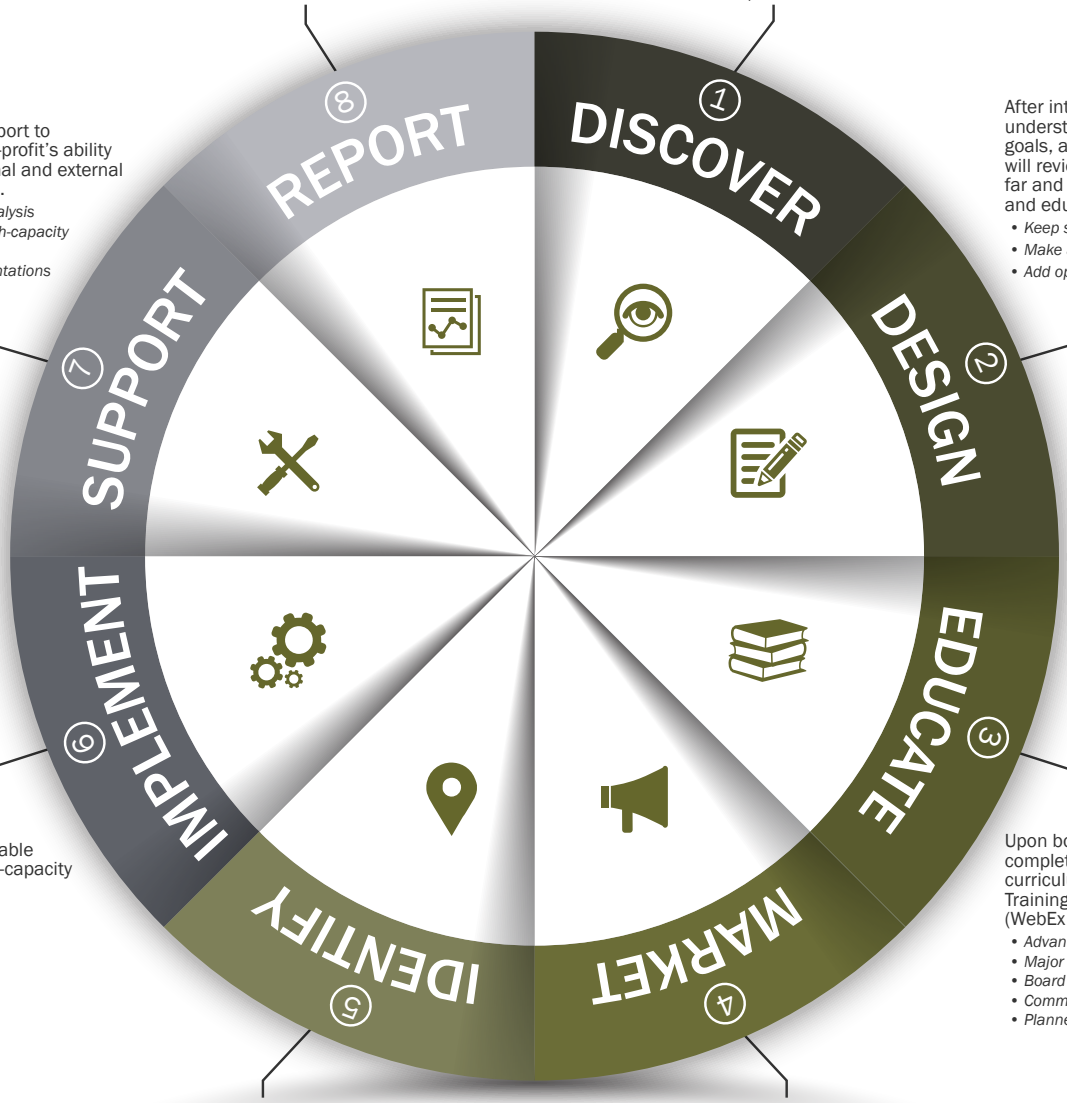
Non-profits identifies its list of high-capacity donors and facilitates one-on-one meetings with Tamar Fink to openly discuss personal charitable gifting strategies and next steps.

Implementation of charitable gifting strategies for high-capacity donors.

Ongoing back office support to continue enhancing non-profit's ability to respond to both internal and external constituent expectations.

- *Web-based survey and analysis*
- *On-going programs for high-capacity donors*
- *Workshop/seminar presentations*

On an as needed basis, Tamar Fink will provide a comprehensive, thorough review of development results and objectives.



DISCOVER DESIGN EDUCATE MARKET IDENTIFY IMPLEMENT SUPPORT REPORT

THIS IS OUR PROCESS FOR MAXIMIZING HIGH-CAPACITY DONOR GIFTS.

We follow a proven system to multiply your charitable gifts and enhance your mission.

TamarFink WEALTH IMPACT