

Major Donor Meeting Worksheet

Donor Name: _____

Spouse/Partner Name: _____

Total Previous Giving: _____

Year Over Year Giving:

2022: _____

2019: _____

2021: _____

2018: _____

2020: _____

2017: _____

Compelling Offer Framework

Problem (incomplete story):

Solution (how the donor can provide the solution)

Value (impact the donor's gift will have)

Urgency (deadline, consequences)

Ask Amount: \$ _____

Meeting Notes

Meeting Location and Attendees

How did the donor respond to the offer?

Did the donor have any specific questions?

What is the necessary follow up?

Additional Notes

For help pinpointing the exact amount to ask your major donors for visit
www.MajorDonorMagicFormula.com