



Pleiades Deliverables	Concierge	Comprehensive	Marketing Only	Basic
Marketing Implementation - Using 3rd Party Vendor (\$5,500/year)				
Website/Marketing Platform Coordination	X	X	X	
Target Audience Identified - Segmentation and List Dev.	X	X	X	
Gift Planning Documents for Frontline Fundraisers	X	X	X	
Annual Marketing Calendar	X	X	X	X
Monthly Strategic Plan	X	X	X	
eNewsletter for Gift Planning (Key Stewardship Piece)	Monthly	Monthly	Monthly	
eBlasts (Gift Vehicle Specific Based on Highest ROI Vehicles)	Unlimited	Monthly	Monthly	Monthly (Content Only)
Print Design and Implementation (Org to budget)	Quarterly	Quarterly	Quarterly	
Gift Planning Survey	Unlimited	One/Year	One/Year	
Thematic Marketing Campaigns	Unlimited	One/Year	X	
Board and Staff Education/Availability	X	X	X	X
Working with Organizational Publications and Media	X	X	X	
Printed Original Materials for Estate Planning Seminars	X	X	X	X
Pleiades On-Call	X	X	X	X
Donor Relations				
Top Prospect Database Input	X	X	X	
In Person Donor Visitation	X	Limited		
Ongoing Stewardship to Secure Gift	X	Limited		
Gift Planning Committee Development	X			
Donor Prospect Cultivation, Giving Conversations	X	X		
Crucial Conversations, Counsel for Structuring Giving Vehicles	X	X		

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Moves Management	X	X		
Comprehensive Gift Proposals/Illustrations	X	X		
Legacy Society Development	X	Limited		
Estate Planning Seminars	X	4/Year	2/Year	2/Year
Event Attendance and Relational Engagement	4/Year	1/Year		
Professional Advisor Participation				
Develop Professional Advisor Base	X	X		
Educational Resources for Advisors	X	X		
Professional Advisor Introductions and Engagement	X	X	Limited	Limited
Advisor Involvement (Estate Planning Seminars and Follow Up)	X	X	Limited	Limited