

Legacy Enquiry Form

This form uses logic to mildly adjust the fields that appear as front of staff fill out the information. The next section, therefore, appears on completion of the previous to keep a conversational flow. On submit, the information is stored in Microsoft Forms and an automated alert email is send to the legacy officer. Of course, the questions will very much depend on the needs of each individual charity - but hopefully it offers an idea.

**Ymddiriedolaeth Natur
Gogledd Cymru
North Wales
Wildlife Trust**

Legacy Enquiry Form

A record of a phone or in-person enquiry about gifts in Wills or pledges.
Mike will automatically be notified of a new entry.

Please use the questions below to prompt your conversation.

Hi, Mike. When you submit this form, the owner will see your name and email address.

1. What is the nature of your legacy enquiry?

- Interested in leaving a gift in their Will
- Interested in a free Will
- Tell us of a pledge they have already made
- Other

**Ymddiriedolaeth Natur
Gogledd Cymru
North Wales
Wildlife Trust**

Legacy Enquiry Form

A record of a phone or in-person enquiry about gifts in Wills or pledges.
Mike will automatically be notified of a new entry.

Please use the questions below to prompt your conversation.

Hi, Mike. When you submit this form, the owner will see your name and email address.

1. What is the nature of your legacy enquiry?

- Interested in leaving a gift in their Will
- Interested in a free Will
- Tell us of a pledge they have already made
- Other

**Ymddiriedolaeth Natur
Gogledd Cymru
North Wales
Wildlife Trust**

Legacy Enquiry Form

A record of a phone or in-person enquiry about gifts in Wills or pledges.
Mike will automatically be notified of a new entry.

Please use the questions below to prompt your conversation.

Hi, Mike. When you submit this form, the owner will see your name and email address.

1. What is the nature of your legacy enquiry?

- Interested in leaving a gift in their Will
- Interested in a free Will
- Tell us of a pledge they have already made
- Other

**Ymddiriedolaeth Natur
Gogledd Cymru
North Wales
Wildlife Trust**

Legacy Enquiry Form

A record of a phone or in-person enquiry about gifts in Wills or pledges.
Mike will automatically be notified of a new entry.

Please use the questions below to prompt your conversation.

Hi, Mike. When you submit this form, the owner will see your name and email address.

1. What is the nature of your legacy enquiry?

- Interested in leaving a gift in their Will
- Interested in a free Will
- Tell us of a pledge they have already made
- Other

2. Would it be OK if I pass your information to our legacy development officer, Mike, so he may get in touch to answer your questions?

- Yes
- No (If "No" it skips to section 6)

2. Would it be OK if I pass your information to our legacy development officer, Mike, so he may get in touch to answer your questions?

- Yes
- No (If "No" it skips to section 6)

2. Would it be OK if I pass your information to our legacy development officer, Mike, so he may get in touch to officially record your pledge, thank you personally and invite you to our yearly thank you event?

- Yes
- No (If "No" it skips to section 6)

2. Would it be OK if I pass your information to our legacy development officer, Mike, so he may get in touch to answer your questions?

- Yes
- No (If "No" it skips to section 6)

3. Preferred language

- Welsh
- English

4. Full name

5. Preferred contact details (ideally email or telephone)

3. Preferred language

- Welsh
- English

4. Full name

5. Preferred contact details (ideally email or telephone)

3. Preferred language

- Welsh
- English

4. Full name

5. Preferred contact details (ideally email or telephone)

3. Preferred language

- Welsh
- English

4. Full name

5. Preferred contact details (ideally email or telephone)

6. Further details of the enquiry, if required

Submit

6. Further details of the enquiry, if required

Submit

6. Further details of the enquiry, if required

Submit

6. Further details of the enquiry, if required

Submit