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.

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Legacy Enquiry Form	Legacy Enquiry Form	Legacy Enquiry Form	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.	A record of a phone or in-person enquiry about gifts in Wills or pledges. Mike will automatically be notified of a new entry.	A record of a phone or in person enquiry about gifts in Wills or pledges. Mike will automatically be notified of a new entry.	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.	Please use the questions below to prompt your conversation	Please use the questions below to prompt your conversation	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.	HI. Mike, When you submit this form, the owner will see your name and email address.	Hi, Mike. When you submit this form, the owner will see your name and email address.	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?	1. What is the nature of your legacy enquiry?	1. What is the nature of your legacy enquiry?	1. What is the nature of your legacy enquiry?
Interested in leaving a gift in their Will	Interested in leaving a gift in their Will	Interested in leaving a gift in their Will	Interested in leaving a gift in their Will
○ Interested in a free Will	Interested in a free Will	Interested in a free Will	○ Interested in a free Will
Tell us of a pledge they have already made	Tell us of a pledge they have already made	Tell us of a pledge they have already made	Tell us of a pledge they have already made
Other	Other	Other	Other
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?	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?	 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? 	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	(i) Yes	Yes	Yes
○ No (If "No" it skips to section 6)	○ No (If "No" it skips to section 6)	○ No (If "No" it skips to section 6)	○ No (If "No" it skips to section 6)
3. Preferred language	3. Preferred language	3. Preferred language	3. Preferred language
○ Welsh	○ Welsh	○ Welsh	○ Welsh
○ English	○ English	○ English	○ English
4. Full name	4. Full name	4.Full name	4. Full name
Enter your answer	Enter your answer	Enter your answer	Enter your answer
5. Preferred contact details (ideally email or telephone)	5. Preferred contact details (ideally email or telephone)	5. Preferred contact details (ideally email or telephone)	5. Preferred contact details (ideally email or telephone)
Enter your answer	Enter your answer	Enter your answer	Enter your answer
6. Further details of the enquiry, if required	6. Further details of the enquiry, if required	6. Further details of the enquiry, if required	6. Further details of the enquiry, if required
Enter your answer	Enter your answer	Enter your answer	Enter your answer
Submit	Submit	Submit	Submit