

STELLAR CLIENT INVESTOR RELATIONS & RETENTION PLAN WORKSHEET ©

	Est. Budget		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
	Unit	#	Total											
Campaign Victory Celebration	\$	1	\$											
Quarterly Print newsletter	\$	4	\$	TOPIC			TOPIC:			TOPIC:			TOPIC:	
Monthly e-newsletter	\$	12	\$	TOPIC:	TOPIC:	TOPIC:	TOPIC:	TOPIC:	TOPIC:	TOPIC:	TOPIC:	TOPIC:	TOPIC:	TOPIC:
Quarterly Chairman's Investor Briefing Breakfast	\$	4	\$											
Postcard On All Major Job Announcements	\$		\$											
1/4ly Letter From Pres./Chair	\$	4	\$											
Mail Copy of New Direct Mail/Brochure/Marketing Mat.	\$		\$											
Annual ROI-Report Card www.ROIMetrix.com	\$	1	\$											
Mail Strat. Plan & Any Major News Releases	\$		\$											
Annual Billing (personalized)		1												
[Other]														
TOTAL Budget			\$											

Follow-up Multi-Year Campaign process should begin at the START of the FINAL pledge year to avoid a lapse in organizational funding.

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