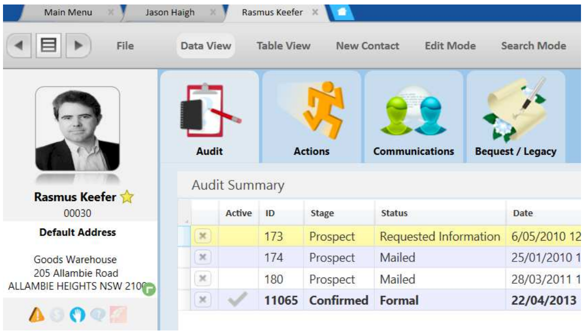
thankQ bequests

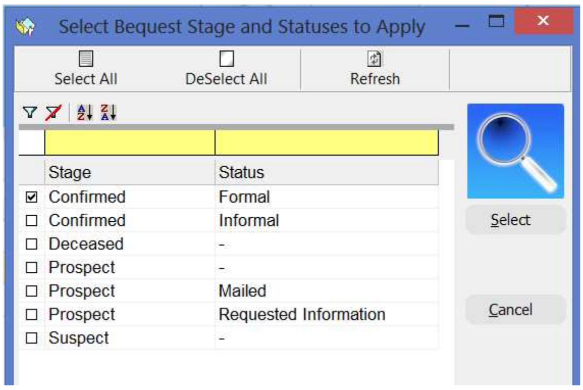
Facilitates:

- Your Bequest prospecting strategy
- Recording Bequest Information
- Managing of the Bequest after death
- Communications tracking
- Solicitor, Next of Kin, Copy of Will, Executor
- Tracking payments
- Document management



Bequest prospect strategy

Using thankQ's marketing tools such as Mailings (newsletters, campaign letters, direct mail, etc) , and website to capture information on enquiry, and registration of interest for making a bequest, along with the Event module to host seminars or Father's Day (give in memory seminars), and to target funeral homes and solicitors. All tools are part of your complete bequest prospect strategy. Financial targets and key documents may be associated with the bequest campaign.



Tracking and Information

Having identified your bequest prospects, you need to use thankQ's bequest tools to track over an extended period of time what stage of the process you are up to, and what are your next actions. Using thankQ's accurate record keeping allows you to capture why they are bequesting. For example, to be honoured, they enjoy being invited to special events, they'd like to be a part of the Bequest Club and treated as a VIP.

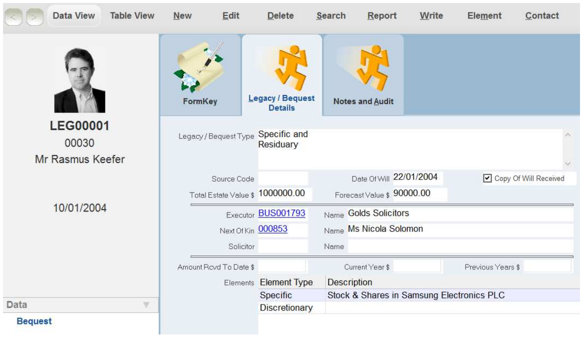
Collecting and preparing all this information will hopefully lead to securing a major bequest when the time comes..

Type	Date of Will	Notification Date	Total Estate Value	Forecast Value	Copy of Will
Residuary		14/12/2009	$1,000,000.00	$10,000.00	No

Workflow, communications & actions

Communications with your prospects are all logged. Actions that need to be worked through can be tracked and scheduled in for future dates where necessary, meetings can be arranged and minutes of them logged, outcomes of requests and meetings can be seen and decisions made can be analysed, or information logged such as copies of Wills, names of the executor and next of kin

Your bequest managers can prepare and maintain complete stages of the entire bequest process, collecting sensitive information so that in the event of the death of your prospect, you are completely prepared with all information at hand – avoiding the need to disturb the family in their time of grief.



Detail and reporting

All bequest information is detailed by bequest prospect, ready for use. At the time of death, the database automatically handles Trust/Foundation contact, related contacts and deceased markers in the database once the contact has been marked as "Contact Has Died". Further, the in-built reports detailing bequest prospecting and potential nett worth to your organisation can be easily printed at any time.

thankQ Bequest Mailing Response Report

Period 01 Dec 2009 - 14 Dec 2009

Mailing	Title	Created	Mailed	Benefactor of Will Rec
M0779	Bequest	5/12/2009 16:19	1	
M0781	Bequest Booklets	5/12/2009 19:39	2	
M0782	Bequest Prospects	6/12/2009 12:53	29	1
M0783	Bequest Prospects Second Mailing - M0782	6/12/2009 22:07	23	
M0784	Bequest Mailing - New Prospects after 10/12/09	11/12/2009 10:05	2	
M0785	Bequest Prospects OK to Mail	11/12/2009 13:00	2	
M0787	Bequest Mailing VIPS	13/12/2009 22:22	94	