<u>Account Plan Template</u> (all fields must be complete)

- **Plan name (can have multiple plans)**

- **Donor(s) Name**

- **Market**
  - Secondary market

- **Relationship Team members**
  - Relationship Manager
  - Strategies
  - Team Member

- **Historical Overview**

- **Annual Goal for this FY**
  - **Target for the FY**

- **Engagement Opps (6/12/18 mo)**

- **Current Philanthropic Priorities**

- **Major gift Opportunity ($)**
  - **(Donor) Lifecycle stage**
  - **Next ask amount**
  - **Next ask -timing**