

# Account Fact Sheet

(One Sheet for Each Account)

Company Name:  
CEO Name:

Phone Number:  
ECC Name:

Campaign 2008 Gift:

Number of Employees:

Campaign 2009 Goal:

## Checklist

- Meet with CEO (date)
- Meet with ECC (date)
- Schedule employee meeting/rally (date)
- Advise United Way of all meetings scheduled
- Gather supplies for meeting:
  - Pledge cards/Carriers
  - Loyal Contributor Cards
  - Campaign video
  - Employee pins
  - Banner, pennants, balloons
- Schedule speakers and program provider tours through United Way office
- Check on progress \_\_\_\_\_(date)
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- Email Account Tracking Form to LE Section Chair & United Way WEEKLY
- Turn in pledges and money to United Way office**
- SAY THANK YOU!!! Personal note to CEO & ECC; e-mail to committee
- Verify that United Way office has all paperwork from ECC
  - Summary sheet signed by ECC
  - United Way copies of pledge cards
  - Spreadsheet to United Office
- Signed corporate pledge card
- Make reservations for Kick-off Luncheon – **September 18**, Abilene Civic Center
- Make reservations for Campaign Event -- **October**
- Make reservations for Campaign Celebration– **December 3**