

Getting Started with a Planned Giving Ministry and Legacy Society

You Can't Sell Soap without Taking a Bath. - Hugh Majors

Plan to Hold Two Major Events a Year

- 1) Informative Invitational/Celebration Event
- 2) Celebration/Gratitude Event

Planning Your Planned Giving Invitational Event

Hold an Invitation Event on a Saturday, or over Four or Five Sundays in Adult Forum

Components of a Planned Giving Invitational Event – “Final Affairs Fair”

1. Theological/Pastoral Overview of Planned Giving and by a Legacy Ministry member or Clergy
2. Lawyer to Talk about Making Wills
3. Certified Financial Planner to Talk about Financial Instruments for Leaving a Legacy Gift
4. Clergy to Talk about Celebration of Life/Memorial Service Plans
5. Optional - Cemetery/Funeral Home Representative to talk about Burial/Cremation options and costs - This also can be done by an informed person with resource material backup.
6. Lunch with Legacy/Bishop's Society Members and two-three speakers giving a brief statement about why they have made a planned gift
7. Legacy/Bishop's Society Registration Forms

Suggested Agenda for Planned Giving Invitational Event

NOTE: These components can be broken out and given over a series of dates ending with a celebration event and a couple of personal stories presented by current Legacy society members.

- 9:00 Coffee and Gathering
- 9:25 Opening Prayer, Welcome and Introductions of Panel
- 9:30 Theological /Pastoral Overview
- 9:40 Panel to address the question, “What does a person need to bring with them to your office to do this work?”
- 10:15 Break
- 10:30 Small Group Q & A - breaking into 3 or 4 groups (depending on the number of lawyers, financial planners, clergy and funeral service directors available. Rotate every 20 minutes
- 10:50 Rotate to 2nd Small Group
- 11:10 Rotate to 3rd Small Group
- 11:30 Rotate to 4th Small Group
- 11:50 Prayer and Lunch
including any existing Legacy Society Members with 2 or 3 of these briefly telling why they chose to make a bequest to the church
- 1:00 Closing Prayer, Blessing and Dismissal

Follow-up after Planned Giving Invitational Event

- Write Thank You Notes to Attendees
- Call for Follow-up 4-6 weeks later
- Regular Articles in Parish Newsletter/E-Letter
- Ask Permission to Publish Names in Newsletter

Other Administrative Work

- Record Members and Bequests
- Setting Guidelines for Undesignated Bequests
- Endowment Fund (Directed to Specific Ministry)
- Annual Thank You Notes separate from the Celebration Event sent from:
 1. Rector/Vicar
 2. Vestry
 3. Also consider children making Thank You Cards and sending them to Legacy members
- Planning the Celebration/Gratitude Event

The Legacy Society Celebration and Gratitude Event

- This should be a Budgeted Item and held every year.
- Dinner/Wine & Cheese/Other Rotating types every other/third year
- Short Speaker (5-10 Minutes) focused on Legacy and Gratitude
- Thank You Cards presented with a short enclosure relating a story about the benefit of a particular bequest to your congregation.