

## **Getting Started/Restarted with a Planned Giving Ministry and Legacy Society**

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

In other words, if you're going to start a planned giving ministry it's always good to have someone who has designated a bequest to an Episcopal entity involved in the leadership of the ministry.

### **Plan to Hold Two Major Events a Year**

- 1) Informative Planned Giving Workshop
- 2) Celebration/Gratitude Event

### **Planning Your Planned Giving Event**

Hold a Planned Giving Event on a Saturday, or over Four or Five Sundays in Adult Forum

### **Components of a Planned Giving Event – “Final Affairs Fair” with a Panel of Resource Persons**

- Theological/Pastoral Overview of Planned Giving and by a Legacy Ministry member or Clergy
- Lawyer to Talk about Making Wills
- Financial Planner to Talk about Financial Instruments for Leaving a Legacy Gift
- Local Clergy to Talk about Celebration of Life/Memorial Service Plans
- 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 or a simple handout.
- Lunch with and existing Legacy/Bishop's Society Members and two-three speakers giving a brief 2-3 minute statement about why they have made a planned gift
- 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 of Resource Persons
- 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 of new Legacy Society members in Newsletter

### **Other Administrative Work**

- Record Members and Bequests
- Encourage Members to register and attend the diocesan Bishop's Society Annual event
- 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/Bishop's Committee
  3. Planned Giving Ministry Leadership/Stewardship Ministry
  4. Also consider children making construction paper Thank You Cards and sending them to Legacy Society Members – after all, they will be the beneficiaries!

### **Planning the Celebration/Gratitude Event**

The Annual Legacy Society Celebration and Gratitude Event

- This should be a Budgeted Item and held every year.
- Dinner/Wine & Cheese/Other Rotating types of celebrations each 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.

For more information on starting a Planned Giving Ministry/Legacy Society at your church email:

[stewardship@ecww.org](mailto:stewardship@ecww.org) or [plannedgiving@ecww.org](mailto:plannedgiving@ecww.org)

or call the Diocesan Stewardship and Development Office at (206) 325-4200.