

Suggestions for Encouraging Planned Gifts in Your Church

1. Have a quality post that can be moved around the facilities periodically. It would either ask the question "Have you remembered the church in your will?" or some example of the merits of a planned gift with the name of the person in the congregation to call for more information.
2. Print a simple, but clear brochure noting the merits of planned gifts and specific information about the congregation such as its legal name and suggested wording for a codicil. Place in the narthex or other location and mail to the membership once a year.
3. Depending on the frequency publication, use the church newsletter to:
 - give personal reflections on the joys of doing a planned gift
 - tell stories of life income gifts benefiting individuals and then the church
 - announce recent gifts and interpret previous gifts or funds still making a difference
 - provide wording for wills and codicils to wills
 - tell what previous gifts are now supporting
4. Insert something about the church's endowment in the mid-year mailings of contribution statements.
5. Plan and provide a planned giving seminar (or series) once or twice a year for the whole membership or for particular age groups within the church. Topic ideas:
 - Elder Care
 - Living Arrangements (living options, home care, nursing services and provisions in Medicare and Medicaid.)
 - Planning for financial security - will I have enough?
 - Organ/tissue donation
 - Planning the disposition of my estate
 - Burial options
 - Funeral planning
6. Once or twice a year provide a bulletin insert regarding some educational aspect of planned giving or examples of its impact on your congregation.
7. Create a "Planned Giving Corner" in an area where you share information at the church. Include various brochures such as Prepare to Write Your will, Create a Charitable Gift Annuity...etc.
8. Hold a Legacy Society Recognition Event – First spend time promoting planned giving and then announcing the Legacy Society and asking the parishioners to become "founding members" by letting you know they are including the church in their estate plans. Then have an event for the "founders". Keep this group informed about gifts received and how the money is being used.