

Annual Invitation Letter

Similar to an annual appeal letter, an annual Planned Giving Invitation raises awareness of the church's Legacy Society and invites parishioners to self-identify if they have already made a planned gift of any kind. Grounded in the Christian call to faithful stewardship, an annual Planned Giving Invitation invites parishioners to reflect on how their legacy can bear lasting witness to God's mission through the church, now and for generations to come.

Generic Letter

Planned Giving Invitation

[Church logo]

[Legacy Society logo]

Dear _____,

The Legacy Society of [name of church] was created to celebrate and recognize anyone who has remembered the church in their estate plans or have made the church a beneficiary of your bequest in a will, trust, life insurance beneficiary, pay on death account, etc.

If you have named [name of church] as a beneficiary of your estate in any way or have made arrangement for another other planned gift - regardless of the amount or the form of the gift - please let us know! We would like to recognize your generosity by adding your family to our list of legacy members.

****IF YOU HAVE A RECOGNITION EVENT SCHEDULED INCLUDE A SAVE THE DATE INFO*** For example: Please also save the date for a special reception [location] as a token of our appreciation].

Please contact _____ or complete enclosed form and return it in the enclosed envelope. (In the event you prefer to remain anonymous, there is an option on the form for doing so.)

If you have any questions or would like help getting started with making a planned gift to [name of church], please contact _____.

Sincerely,

Clergy/Warden and Legacy Ministry Chair