

# Building a Planned Giving Ministry

## *The Big List — Working Session Worksheet*

*You don't have to do everything. Use this worksheet to identify your priorities and capture next steps.*

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### □ 1. Appoint a Planned Giving Ministry Steering Team

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Who will serve on your steering team? Draw from vestry, stewardship leaders, former wardens, parish patriarchs/matriarchs, and someone with hospitality or event-planning gifts. Ideally, members have made — or are considering — their own planned gift.

*List potential names and any follow-up needed:*

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### □ 2. Choose a Name and Establish an Identity

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#### **Name**

Choose something that has meaning to your congregation. Consider whether "Circle" (perceived as more inclusive) or "Society" better fits your culture. Does your church have an existing annual event (e.g., Founders Day) that could inspire the name?

*Name ideas and your top choice:*

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#### **Logo**

Will you commission a logo for use on letterhead, bulletins, and digital communications? Who might design it?

*Designer or approach:*

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#### **Member Gift**

A special, timeless gift helps members feel honored — a silver pin, a replica of the church's cornerstone, a commissioned bookmark or prayer card. What feels right for your congregation?

*Gift ideas and cost considerations:*

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### □ 3. Collect Existing Names

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Your church may already have a file of people who indicated a planned gift — perhaps on a past pledge card — and those names were never followed up. Locate and resurrect that list.

*Who will search the files? What is the timeline?*

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### □ 4. Launch an Annual Legacy Letter Campaign

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Similar to the annual pledge appeal, send a letter from your rector, priest-in-charge, or Legacy Committee asking people to self-identify if they have already made a planned gift. Speak to the theology of legacy and the church's mission.

*Bulletin announcements: plan for 3 weeks, with a follow-up email one week after the letter goes out. The weeks leading up to Ash Wednesday are a natural fit.*

Who will draft the letter? Approximate send date?

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Who will manage the response tracking and add names to the Legacy Society list?

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### □ 5. Create an Annual Recognition Event

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The event can be a dinner at the rectory, a cocktail reception at the church, a wine-and-cheese gathering, or anything that feels fun, meaningful, or interesting to your community. The goal is to honor members — not to solicit gifts.

#### Event Format and Venue

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#### Annual Date

Choose a date with meaning to the parish and no pre-existing conflicts — and pre-calendar it every year. Movable dates get lost.

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**Guest Speaker**

A speaker helps make the event feel special. Their role is not to encourage more giving, but to reinforce members' decisions, express gratitude, and share stories of how legacy gifts make a difference. Who might you invite?

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**Promotion Plan**

In the month before the event: send a formal invitation to all Legacy Society members; include in bulletin and announcements; recognize members at the main service prior to the event.

*Who is responsible for invitations and promotion?*

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**□ 6. Add Planned Giving to the Annual Pledge Card**

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Add two checkboxes to your pledge card — both print and digital — every year:

- I am interested in making a bequest or other planned gift*
- I have ALREADY remembered [Church Name] in my estate plans*

"Interested" responses should receive a phone call or email follow-up. "Already remembered" responses should receive an immediate thank-you letter from clergy or the warden, and be added to the Legacy Society.

*Who will manage follow-up on each type of response?*

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**□ 7. Establish an Annual Rhythm**

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The three core recurring activities — the letter campaign, the recognition event, and the pledge card checkboxes — should repeat every year. Consistency is what builds a Legacy Society over time.

*Who is responsible for ensuring these are calendared and executed each year?*

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**□ 8. Build Out Your Website**

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Dedicate a section of your parish website to the Legacy Society, planned giving, and how to get started. At minimum this page should include:

- The church's legal name and EIN (tax identification number)
  - Suggested bequest language for attorneys and financial planners
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- A brief description of the Legacy Society and how to join
- Types of planned gifts accepted (bequests, beneficiary designations, charitable remainder trusts, etc.)
- A contact name or email for questions

*Who will build or update the page? What information needs to be gathered first (EIN, bequest language, contact person)?*

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## □ 9. Create a "Planned Giving Corner"

Set aside a visible space in the church — a table in the narthex, a display near the office, or a rack in a well-trafficked hallway — where planned giving materials are always available. People should feel comfortable picking up a brochure without anyone noticing.

Stock the space with fact sheets on: bequests, beneficiary designations, how to start a conversation with an estate planner, and information about your Legacy Society. Replenish regularly so it never looks depleted.

*Location? Who will stock and maintain it?*

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*What materials do you need to create or obtain?*

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## □ 10. Offer Workshops and Adult Formation

Consider offering a "Life and Legacy" adult formation series around Ash Wednesday that weaves together spiritual conversations about purpose and legacy with practical information on elder care, estate planning, and end-of-life preparedness. Brand it as a ministry of the Legacy Society.

Topics might include: writing an ethical will, reviewing beneficiary designations, understanding the basics of estate planning, caring for aging parents, and legacy giving options.

*Is there appetite for this in your congregation? Who might lead it or bring in speakers?*

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*Potential dates or seasons (Lent, fall program year):*

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## Our Top Three Priorities and First Steps

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From everything above, what are the three things your congregation will commit to doing in the next six months?

**Priority 1:**

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**Priority 2:**

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**Priority 3:**

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Who will be our first point of contact at the diocese for support and next steps?

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