



# *A Five Year Planned Giving Promotional Plan*

[www.umchurchlegacy.org](http://www.umchurchlegacy.org)

## **Year 1:**

- Make a **presentation** to church leaders twice a year about possibilities and responses. Invite leaders to make a planned gift.
- Put **one-liners** in all bulletins and newsletters.
- Place an **article** in the church newsletter on planned giving each quarter.
- Plan **two seminars** this year on Wills and Estate Planning: October, March.

## **Year 2:**

- Make a **presentation** to church leaders twice a year about possibilities and responses. Invite leaders to make a planned gift.
- Plan and celebrate a **Memorial Sunday observance**.
- Put **one- liners** in all bulletins and newsletters.
- Place an **article** in the church newsletter on planned giving each quarter.
- Send **two planned giving mailings**
  1. To the entire congregation on the importance of estate planning and the benefits of making a gift through the church. Offer to those who request a brochure on recording your estate wishes, such as "Suggestions Upon My Death: A Final Gift of Love."
  2. To the entire congregation on the opportunity of giving through estate planning. Offer a brochure to any who respond on "Why Should I Include the Church in My Will?"
- Plan **three seminars**
  1. February- General Seminar on Wills and Estate Planning
  2. May- Estate Planning for Women
  3. October- Estate Planning for Men

## **Year 3:**

- Make a **presentation** to church leaders twice a year about possibilities and responses. Invite leaders to make a planned gift.
- Put **one- liners** in all bulletins and newsletters.
- Place an **article** in the church newsletter on planned giving each quarter.
- Plan and celebrate a **Memorial Sunday observance**.

- Plan an **Endowment Sunday celebration**.
- Design **two endowment newsletters** to go to everyone:
  1. Theme: Let me introduce you to the endowment program of this church.
  2. Theme: You Can Be A Philanthropist. Tell stories of what others are doing. Help people see how they can give.
- Send **three planned giving mailings**
  1. To the entire congregation on the opportunity of giving through estate planning. Offer a brochure to any who respond on "No will No Way!"
  2. To entire congregation (in December) on Ways to Give at Year End.
  3. To all leaders, all on committees, and the top 25% of givers: "Giving Is an Act of Faith."
- Plan **four seminars**
  1. January- Can I Afford to Retire? (including time on estate planning)
  2. March- General Seminar on Wills and Estate Planning
  3. May- Financial Planning (including Wills) for Parents
  4. October- General Seminar on Wills and Estate Planning

#### Year 4:

- Make a **presentation** to church leaders twice a year about possibilities and responses. Invite leaders to make a planned gift.
- Put **one-liners** in all bulletins and newsletters.
- Place an **article** in the church newsletter on planned giving each quarter.
- Plan and celebrate a **Memorial Sunday observance**.
- Plan an **Endowment Sunday celebration**.
- Design **three endowment newsletters** to go to everyone:
  1. Theme: Let me introduce you to the endowment program of this church.
  2. Theme: You Can Be A Philanthropist. Tell stories of what others are doing. Help people see how they can give.
  3. Ways I can Give Through my Estate.
- Send **three planned giving mailings**:
  1. To the entire congregation on the opportunity of giving through estate planning. Offer a brochure to any who respond on "No Will No Way!"
  2. To the entire congregation (in December) on Ways to Give at Year End.
  3. To leaders, all on committees, and the top 25% of givers: "Basic Estate Planning Tools."

- Plan **two seminars** this year on Wills and Estate Planning.
  1. October
  2. March

#### Year 5:

- Make a **presentation** to church leaders twice a year about possibilities and responses. Invite leaders to make a planned gift.
- Put **one-liners** in all bulletins and newsletters.
- Place an **article** in the church newsletter on planned giving each quarter.
- Plan and celebrate a **Memorial Sunday observance**.
- Plan an **Endowment Sunday celebration**.
- Design **three endowment newsletters** to go to everyone:
  1. Theme: Let me introduce you to the endowment program of this church.
  2. Theme: You Can Be A Philanthropist. Tell stories of what others are doing. Help people see how they can give.
  3. Can a Living Trust help me assure my financial security and make a gift to my church?
- Send **three planned giving mailings**:
  1. To the entire congregation on the opportunity of giving through estate planning. Offer a brochure to any who respond on "No Will No Way!"
  2. To the entire congregation (in December) on Ways to Give at Year end.
  3. To leaders, all on committees, and the top 25% of givers: "Giving is an Act of Faith."
- Plan **two seminars** this year on Wills and Estate Planning.
  1. October
  2. March