

## A Three Year Plan to Promote Planned Giving in Your Church

### YEAR ONE

Invite a Foundation representative to meet with your committee and/or the Administrative Board early in the year for an open discussion and planning session.

*May* Mail Letter & Brochure:  
“Remember Your Church in Your Will”  
Target ages 40 through 70

*October* Mail Letter & Brochure:  
“The Charitable Gift Annuity”  
Target ages 60 and up.

**Quarterly articles in church newsletter.**

**Monthly one-liners in newsletter.**

**Estate Planning/PG Workshop (preferably in the Spring, before the May mailing.)**

**Website link to Foundation website.**

**Develop policies and a brochure describing your Endowment Program. Establish one or more endowment accounts at the Foundation.**

### YEAR TWO

*February* Mail Letter & Brochure:  
“The Charitable Gift Annuity”  
Target ages 60 and up.

*May* Mail Letter with Response card/  
envelope & Brochure:  
“Remember Your Church in Your Will”  
Target ages 40 through 70

*November* Mail Letter & Brochure:  
“Year-end Giving”  
All households

**Quarterly articles in church newsletter**

**Monthly one-liners in newsletter**

**Estate Planning/PG Panel Discussion Workshop (Spring or Fall)**

**Memorial Observance / Service of Remembrance (suggest All Saints Sunday).**

**Consider a mailing to former members in other places inviting letters and gifts in memory/honor of persons in your church (e.g., a beloved Sunday School teacher or music director, etc.).**

### YEAR THREE

*March* Mail Letter & Brochure: “Your Church Endowment Program” - Target all households

*May* Mail Letter, Response card/envelope & Brochure: “Remember Your Church in Your Will”  
- Target ages 40 through 70

*September* Mail Letter & Brochure: “Giving Securities” - Target ages 40 and up.

*November* Mail Letter & Brochure: “Year-end Giving” - Target all households

**Pastor and/or Committee representative personally visits one planned giving prospect each month. Personal follow-up note.**

**Quarterly articles in church newsletter**

**Monthly one-liners in newsletter**

**Estate Planning / Planned Giving Workshop (Spring or Fall)**

**Memorial Observance and Service of Remembrance**

**Heritage Society banquet (September/October)**

**Annual Report (mail to all households; distribute extra copies at Heritage Society banquet)**

**Keep  
repeating  
Year Three!**  
(with variations)

## Additional Ideas:

If your church uses projection screens for announcements, create Powerpoint slides that use the one-liners, announce workshops, or picture ministries benefited by endowments and planned gifts.

Use e-mail to provide an “e-newsletter” and to target your members for timely information. (For instance, year-end giving information regarding charitable deductions is often helpful.)

Always announce bequests, the amount received and how the funds will be used. (If the donor has requested anonymity, this **MUST** be honored. But announce the receipt of an anonymous bequest – “that will be placed in the First UMC Missions Endowment bringing the endowment total to \$XXXXX. This year, the earnings from this endowment sent three VIM teams to the Gulf coast where they....”)

The Heritage Society can honor charter members and anyone who has remembered the church in an estate plan or with a planned gift. The annual banquet can feature a particular ministry, testimonials from members and a progress report on the Endowment Program. Consider giving all members a lapel pin or other special remembrance.

Ensure that all gifts are acknowledged promptly to the donor (or surviving family members) and that memorial gifts are acknowledged promptly and effectively.

Make sure that donors are recognized appropriately every time endowment funds are used. Ensure that the congregation understands and appreciates where these gifts come from and how they impact ministry.