

Marketing Matters

Interpreting the policy in a reader-friendly way that will encourage prospective donors to make legacy gifts is essential to a successful planned giving ministry. Communicating about the congregation's ministry should never be taken for granted. Successful strategies for promoting planned giving in the church include:

- Creating a simple brochure that discusses how planned gifts will enhance the future ministry of the church. Oftentimes, it can include a very brief summary of different ways to give as well of illustrations of ministry in action. It should never be a reprint of the church's endowment policy;
- Celebrating gifts when they arrive within the context of worship;
- Being open and transparent about how planned gifts are used, including ways distributions provide for the church's ministry;
- Using current church communication devices, including the newsletter and bulletin, to lift up the importance of planned giving as part of individuals' stewardship;
- Creating a Legacy or Honor Society that lets members make known their intentions to leave a legacy gift to the congregation;
- Developing an annual listing or report that indicates new gifts as well as prior gifts to the endowment fund. This publication can encourage new gifts and help families and friends take solace in knowing their loved ones aren't forgotten;
- Installing a permanent wall plaque in a visible location, listing those who have made gifts while reminding others of the opportunity available.

Need More Ideas?

Contact the Foundation for sample newsletter articles as well as church-specific counsel about promoting planned gifts. Call (800) 668-8016 or send an e-mail to info@ccf.disciples.org.

*The Christian
Church Foundation
helps Disciples
make a difference
forever and discover
the joy of
serving Christ
through
sharing their
resources.*

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Starting a Successful

Planned Giving Ministry

Mentoring & Marketing



Helping Disciples Make a Difference

Why a Planned Giving Ministry?

How can the congregation encourage end of life and later in life gifts to support the ministries of the church? How can the congrega-

A planned gift is any major gift, made during lifetime or at death as part of a donor's overall financial and/or estate planning. Planned giving is a method of supporting charities that enables donors to make larger gifts than they could make from their income. While some planned gifts provide a life-long income to the donor, others use estate and tax planning techniques to maximize the gift and/or minimize its impact on the donor's estate.

tion put a plan in place for such gifts that will encourage growth in mission and ministry instead of becoming a crutch which takes the place of church members' need to give?

Congregational leaders are often intimidated about promoting this kind of ministry because they fear that the min-

istry is about arm-twisting and guilt. Nothing could be further from the truth. Focusing on this ministry builds a sense of excitement and hope in the church as the church **teaches, invites and mentors** a spirit of generosity in the life of the church.

A planned giving ministry is more than raising money for the church's future needs. It allows church members to provide their own ongoing legacy to support the ministries and witness of Jesus Christ.

To have a successful planned giving ministry, church leaders – especially the pastor and some trusted, energetic lay members — must be willing to make a long-term commitment that will involve promotion, mentoring, follow-up and transparency.

Christian Church Foundation staff members are trained to help churches develop a planned giving ministry and to create the processes that will make congregations good and worthy stewards of donors' end-of-life gifts.

Successful Strategies

The Christian Church Foundation's experience over more than 50 years has identified key attributes to a successful planned giving ministry. It requires making good use of people's time, capitalizing on opportunities when they appear and avoiding burning out volunteers:

1 The pastor(s) must be a visible, vocal advocate and mentor others, including putting his/her own estate plans in place that include the church. .

2 Create a team of trusted church members who can provide leadership for at least three years, and are also willing to put their own personal plans in place so that they may offer testimony to their belief in the ongoing witness of the church. If leaders aren't committed enough to the church's future to create their own plans of support, how can they encourage others to do so?

3 Implement a permanent fund policy that communicates how end-of-life and other planned gifts will be managed and the income distributed for ministry. The Foundation can provide free consultation services and a successful policy model. A policy, approved by church leadership and the entire congregation, is a key step in encouraging planned gifts.

4 Start a Legacy or Honor Society that includes those who have put plans in place for a legacy gift to the congregation. This provides a tremendous mentoring and teaching opportunity that can encourage others to consider a similar legacy gift.

5 Host educational seminars – provided free of charge by the Foundation – to help church members understand the need to create an estate plan, ways planned gifts can be made and God's call on their lives to be good and faithful stewards, even when

their earthly life is over.

6 Establish a timeline that includes promotion of planned giving through publications and other means, scheduling inheritance planning seminars, recognizing the saints as part of All Saints' Day, honoring the memory of donors and reporting on how the church's witness is enhanced by permanent funds.

Mentoring Matters

Just as the Christian faith is easier caught than taught, so is planned giving. While technical details about planned gift instruments should be left to trained development officers, trusted church leaders play a vital role in encouraging legacy gifts to the church.

Teaching planned giving in the church is most effective when mentored by the pastor and key leaders. When the pastor and leaders include the church in their planned giving and invite others to join with them, church members hear the "teaching of planned giving" with new and more receptive ears. Imagine how church members would respond to a leader saying:

"I can't imagine my life without the influence of this church. It has taught me, supported me and invited me to grow. My life has been enriched and I believe that I have been able to make a difference in this world because of my involvement here. I want to make sure generations to come have the same opportunities. So, I need to tell you that I have included the church in my end of life plans and I feel really good about that. I know my gifts will help to insure that this church remains vital in the future. I can't help thinking that you feel the same way I do and so I want to invite you to join with me in remembering the church in your plans."

Do you think such a testimony will encourage others to act? It has in many congregations and it can in yours, as well.