

# Starting a Legacy Society

## 10 Steps to Launch or Re-launch Your Planned Giving Ministry

1. Appoint a “Legacy Giving” leadership team – no expertise required
2. Decide on a name – consider one that is personal or meaningful to your congregation
3. Add these questions to your pledge cards each year:
  - Please contact me about remembering the church in my estate plans
  - I have already remembered the church in my estate plans
4. Send a letter announcing the Legacy Society and inviting members to consider leaving a gift to the church in their estate plans
5. Choose the date for an annual Recognition Event – such as your founding date, your patron saint’s feast day, etc.
6. Organize an annual event that is special, but appropriate to the number of guests and your context—*doesn’t need to be fancy, just make sure it’s fun and engaging!*
7. Invite those who have already remembered the church in your estate plans to your annual recognition event (i.e., it’s a ‘thank you’ event not a recruiting opportunity)
8. Consider a meaningful gift to give out at the annual event such as an icon of your patron saint, pin, replica of the cornerstone, etc.
9. Have an Estate Planning Attorney on hand for those needing help getting started
10. *Repeat every year and get ready to move to phase 2!*

**Want help getting started? *We are here to help!***

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