



Building a Legacy of Giving at YOUR Church

presented by
LEGACY GIVING TASK FORCE
EPISCOPAL DIOCESE OF MICHIGAN

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STORIES OF IMPACT:

*Share a Legacy Gift that had
an impact on you,
your family or your church?*

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What is a Legacy Society? Why should I care?

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Who are we? What do we do?

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10 Steps to Launch Your Legacy Society

(handout)

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Step 1 Appoint “Legacy Giving” leadership team

- 4-5 vestry, former wardens, patriarch/matriarchs
- Financial planners, estate planning attorneys
- Hospitality, party planning/event planning gifts
- Charge them with the remaining steps – *or calling us!*

TIP – Have some actual LS members!

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Step 2 Decide on a name

- “[name of church] Legacy Society”
- Or alternatively, something personal or meaningful to your congregation, ex:
 - *Society of the Rock (St. Peter’s)*
 - *The Booth Society (Christ Church Cranbrook)*

TIP – Have someone create a logo to help in promotions

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Step 3 Add these questions to your pledge cards:

- ☐ Please contact me about remembering the church in my estate plans
- ☐ I have already remembered the church in my estate plans

TIP – Do it every year and follow-up

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City/State/Zip _____

Primary Phone Number _____

E-mail _____

Date _____

Please send information regarding:

- ☐ Pledging with stock or appreciated securities
- ☐ Pledging electronically or through auto debit
- ☐ Remembering St. Paul's in my estate plans
- ☐ St. Paul's is already part of my estate plans
- ☐ I do not need envelopes

PLEASE CONTACT ME REGARDING:

- ☐ Remembering St. Bartholomew's in my estate plans
- ☐ St. Bartholomew's is already part of my estate plans
- ☐ Please send me pledge envelope

PLEASE CONTACT ME REGARDING:

- ☐ Setting up an automatic debit
- ☐ Paying my pledge with stock or securities
- ☐ Remembering Christ Church Cranbrook in my will or estate plans
- ☐ CCC is already apart of my estate plans

Set up and pay your pledge online! Go to www.stbartschurch.org

In thanksgiving for: _____

I/we pledge for 2018 \$ _____ per ☐ week ☐ month ☐ year

Name(s): _____

Address: _____ Phone: _____

Signature(s): _____ Date: _____

PLEASE CONTACT ME REGARDING:

- ☐ Remembering St. Bartholomew's in my estate plans
- ☐ St. Bartholomew's is already part of my estate plans
- ☐ Please send me pledge envelope

PLEASE CONTACT ME REGARDING:

- ☐ Setting up an automatic debit
- ☐ Paying my pledge with stock or securities
- ☐ Remembering Christ Church Cranbrook in my will or estate plans
- ☐ CCC is already apart of my estate plans

CHRIST CHURCH

I WOULD LIKE TO MAKE MY 2022 PLEDGE IN HONOR OF:

OR

christchurchcranbrook.org/pledge

CONTACT ME ABOUT:

- ☐ Setting up an automatic debit
- ☐ Paying my pledge with stock or securities
- ☐ Remembering Christ Church Cranbrook in my will or estate plans
- ☐ CCC is already apart of my estate plans

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Step 4 Send an annual letter to congregation

- Announce/remind about the Legacy Society
- Invite them to consider leaving a gift
- Who to contact for help getting started
- Use it to share a story of impact, why it's important

TIP – Do it every year, 6 months-ish before your Recognition Event (Step 6)

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Step 5 Calendar an annual Recognition Event

- Chose a day that has some meaning to your congregation, ex:
 - *Founder's Day or date church was built*
 - *Feast day of your patron saint*

TIP – Make it as automatic as Easter or Christmas; and make sure it's a 'good' date w/o conflicts

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Step 6 Plan the Recognition Event

- Appropriate to the number of guests you expect
- Doesn't need to be fancy, but make it meaningful or fun
 - *Legacy-themed Evensong and a reception*
 - *Dinner and a speaker*
 - *Breakfast at Rector's House*
 - *Bus trip and a tour*

TIP – They don't need to all come!

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Step 7 Invite those who have self-identified to your Recognition Event

- Send private invitations to members of the LS
- Advertise publicly that the event is happening
 - Promote in the newsletter/website/bulletin, etc.
 - Announce in your weekly services, post on FB, etc., etc.

TIP – Publicly promote but keep it members-only, i.e. don't make it a 'recruiting' event


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Sign up: www.ccc-info.org/picnic


Summer is for celebrating! What better way than to have a potluck picnic after the 5 PM service. The church will happily provide the main dish! Sign up to bring your favorite picnic dish to share with the congregation and enjoy the best part of living in Michigan: Summer evenings!



SERVE LUNCH AT CROSSROADS OF MICHIGAN

Sunday, Aug 28 | 8:15 AM - 1:30 PM | Detroit, MI
More Details: www.ccc-info.org/crossroads


Join us as we make and feed a Sloppy Joe lunch to 300 guests at Crossroads. The first shift focuses on preparing food and the second shift focuses on serving the guests. We hope to see you there!



WOMEN'S SPIRITUALITY GROUP: KICK-OFF LUNCH!

Wednesday, Sept 7 | 12 - 2 PM
Sign up here: www.ccc-info.org/wsg

All women are invited to a wonderful lunch at the Birmingham Athletic Club (BAC) to get to know one another and to enjoy each other's company as we kick off Women's Spirituality Group! Cost is \$15. Scholarships available.



ARE YOU A MEMBER OF THE LEGACY SOCIETY?

If you have remembered Christ Church Cranbrook in your estate plans in any way, you already are! The **Booth Legacy Society of Christ Church Cranbrook** was established to recognize and celebrate those members who have named the church as a beneficiary of a planned gift of any kind (such as in a will, living trust, annuity, charitable remainder trust, etc.). If you have not already done so, please let us know as we would like to invite you to our Founding to our Future/Legacy Society Reception on **Saturday, September 17 at 6:00 PM** in the new Atrium of Christ Church Cranbrook.

Please contact Rev. Chris Harris at charris@christchurchcranbrook.org or call 248-644-5210 x15

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Step 8 *Consider a meaningful gift for LS members

- *Icon of your patron saint*
- *Silver pins*
- *Replica of Cornerstone, etc.*

TIP – Make the gift visible to the congregation - Bless the icons at the service before the event, have them wear the pin and stand, etc.

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Step 9 Connect with an Estate Planning Attorney

- For people who need help getting started, have an estate planning attorney on hand
- Offer free consultation
- Will take people's call

TIP – Provide inquirers with basic the basic language the attorney might use.

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Step 10 Repeat! And get ready for Phase 2!

- Offer classes life and legacy

What is my legacy? Plan your funeral, Write your obituary, Columbarium tour, etc.

- Guest speaker workshops

Planned Giving, Elder Law, POA's, LTC Planning, etc.

- Expand publicity

Dedicated webpage, LS brochure, etc.

- Administritivia!

Undesignated gift policy, Create an endowment, Endowment policies, etc.

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Does this really work?

Church	Started with	Grew to*	How long?	# of PGS
St. Paul's Cathedral	20	125	7yrs	2
St. Barthomew's	-0-	55	2yrs	1
Christ Church Cranbrook	40	90	3yrs	-0-

- **\$4-6 million in gifts in estimated gifts**
- **\$200k-\$300k in annual income (at a 5% draw)**

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How does that work?

For example:

- Average gift is \$25k
- 20 households

$$20 \times \$25k = \$500,000$$

**Yearly 5% draw = \$25k per year
to your operating budget**



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TAKE OUT YOUR CALENDAR:

**What are 2 steps
you can schedule today?**

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WE ARE HERE TO HELP!



Canon Mark Miliotto
(313) 833-4427



mmiliotto@edomi.org



www.edomi.org/legacygiving

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