



# Foundation of the Diocese of Charlotte

## **Parish/School Planned Giving Committee Promotion Ideas**

- 1. Direct invitation letter from pastor/principal and/or PGC member**
- 2. Planned giving information in bulletins/school communications on weekly basis**
- 3. Planned giving information as bulletin or school insert occasionally**
4. Planned giving information in parish/school newsletter
- 5. Endowment information in bulletins/school communications on a regular basis**
- 6. Periodic Pulpit/Principal announcements**
- 7. Establish Parish and/or School Legacy Society**
- 8. Social event sponsored by Legacy Society, such as breakfast, coffee and dessert, wine and cheese, dinner, etc.**
- 9. Legacy Society member testimonials in bulletin/school communications and/or mailings**
10. Listing of new Legacy Society members in bulletin/school communications or on plaque
11. Listing of endowments established for the benefit of parish or school on plaque
- 12. One or two mailings per year on planned giving topics with planned giving brochure and return card included**
13. Annual Planned Giving Sunday with in-pew cards and parish speaker and/or school communications and school speaker
- 14. Annual parish/school recognition event for society members**
- 15. Estate Planning Seminar every 2-3 years**
16. Parish or school specific Planned Giving brochure
17. Add planned giving information in all new parishioner/school parent welcome packets
- 18. Contact prospective Legacy Society members for meeting to introduce concept (either letter followed by call to set up a visit or direct phone call to set up a visit)**
19. Letters from parish ministry leaders to the ministry members or from school group leaders to group members
20. Presentation to parish ministry meetings or school group meetings

21. Send a letter and brochure to parish or school households to introduce the parishes existing endowment (s)
22. Develop a memorial giving program for the parish/school
- 23. Add letter about planned giving as an insert in the IRS Tax Letter that gets mailed in January.**
24. IRA letters to parishioners, past parents or alumni 70 and above.
25. Table after Mass, in Narthex, or at parish/school events with planned giving materials.
- 26. Either list and describe your endowments in the parish bulletin or school newsletter or provide information about the impact of your endowments.**
27. Parish/school specific planned giving ads to be put in the bulletins, newsletters, website, etc.
- 28. Take the opportunity to thank parishioners or school constituents who are remembering the parish (even if they have NOT self-identified) through their estate plan via parish communication outlets and events / functions.**
29. Publish an annual report that includes information on Planned Giving and Endowments.

Note: Immaculate Conception Church and Immaculata School have the most effective planned giving committee in the diocese. Currently, over 125 individuals have told them they have remembered or are remembering the parish and/or the school in their estate plans. Immaculate Conception Church and Immaculata School have 15 endowments - 4 for the parish and 11 for the school. The bolded items are actions they have already taken to market the idea of planned gifts to their parish and school community.