

5 Steps to Legacy Giving in your congregation

*And how your church is already
equipped for this program!*

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5 Steps

1. Teach Legacy Giving
2. UCC Planned Giving and United Church Funds
3. Adopt a Gift and Endowment Policy
4. Invite Gifts
5. Celebrate Giving



Legacy Giving

Your Ultimate Gift - 100%

**Will/Trust
Testament
Example**



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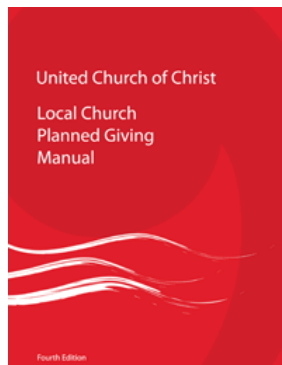
Legacy Giving Definitions

Planned Gifts

- **Deferred Gifts**
- **Life Income Gifts**

Step 2:

We are already equipped?



United Church of Christ Planned Giving Program

<http://www.ucc.org/giving/local-church-planned-giving.html>



Offering a family of professionally managed, diversified & socially responsible investment funds to UCC churches and ministries



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Step 3: Adopt Gift, Memorial Gifts, Investment & Endowment Policies

Best Practices for Endowments

- Mission Oriented Funds
- Managed by Professionals



Step 4: Invite Gifts

- ✓ Help members to see their Will/Trust as part of their holistic stewardship
- ✓ Will you leave more than an empty pew?
- ✓ Invite every leader to consider a bequest and testimony
- ✓ Mail bequest language to everyone around April 15 and print on PR materials and website
- ✓ Hold a seminar every 3 years on planned giving



Step 5: Celebrate Giving

- ✓ Establish a Legacy Society and annual event
- ✓ Quarterly articles about the impact that a legacy gift is having in today's ministry with tie-back to the giver
- ✓ Recognition: The wall, the PowerPoint, the brick walk, the website

