

Planned Giving Marketing Program

Month-to-Month Implementation Plan

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| Month 1 | <ul style="list-style-type: none"> • Introduce (or reintroduce) Planned Giving with a personal letter - possibly more than one letter depending on the audience/generation. • Pastor/Elder begin making a list of potential donors and then set up meetings/coffees to discuss planned gifts. |
| Month 2 | <ul style="list-style-type: none"> • Begin publicity for a congregational workshop on Planned gifts. • Publish an article with the date and announce it each Sunday. • Order Wills and Bequests bulletin inserts. Can get them free of charge from TPF. |
| Month 3 | <ul style="list-style-type: none"> • Write article for the newsletter on ways to give. |
| Month 4 | <ul style="list-style-type: none"> • Article on ways to give. Include phrases such as <i>"Have you remembered the church in you will?"</i> • Introduce the concept of leaving a "Legacy pledge" to the church. |
| Month 5 | <ul style="list-style-type: none"> • Develop a display ad covering several options for leaving a legacy gift to the church that you can use throughout the year in different publications. • Have someone in the church deliver a "Minute for Mission" during the worship service, sharing how they have made a planned gift. |
| Month 6 | <ul style="list-style-type: none"> • Write article for the newsletter on ways to give • Hold congregational workshop to present giving options. Consider doing this in conjunction with a luncheon as well. |
| Month 7 | <ul style="list-style-type: none"> • Publish a story of someone who made a planned gift to a church, how it was used, and what benefits were to the donor and the church. |
| Month 8 | <ul style="list-style-type: none"> • Host a "Legacy Dinner" honor those who have left the church in their Will (one year after you kick off your program). This will give you a chance to ask "who has given to the church" • Postcard/letter on Bequests: targets your faithful donors (the ones who have given almost every year, regardless of the amount) and tell them how their involvement with the church can continue beyond their lifetimes. The card highlights the simplicity and satisfaction of endowing annual giving through a Bequest. |
| Month 9 | <ul style="list-style-type: none"> • Mail a letter very similar to the one you mailed in Month 1. |
| Month 10 | <ul style="list-style-type: none"> • Article in Newsletter on giving options |
| Month 11 | <ul style="list-style-type: none"> • Minute for Mission |
| Month 12 | <ul style="list-style-type: none"> • Publish a letter/article celebrating the success of the plan. Get people excited about working the plan next year... give them goals and challenges. |