



Foundation of the Diocese of Charlotte

Parish Planned Giving Committee Promotion Ideas

- 1. Direct invitation letter from pastor and/or PPGC member (Initial)**
- 2. Planned giving information in bulletins on weekly basis (W)**
- 3. Planned giving information as bulletin insert occasionally (A)**
- 4. Planned giving information in parish newsletter (Q)**
5. Endowment information in bulletins on a regular basis (M)
- 6. Periodic Pulpit announcements (S)**
- 7. Establish Parish Legacy Society (Initial)**
- 8. Social event sponsored by Legacy Society, such as breakfast, coffee and dessert, wine and cheese, dinner, etc. (A)**
9. Legacy Society member testimonials in bulletin and/or mailings (S)
10. Listing of new Legacy Society members in bulletin or on plaque (Optional)
- 11. Two mailings per year on planned giving topics with planned giving brochure and return card included (S)**
12. Annual Planned Giving Sunday with in-pew cards and parish speaker (A)
- 13. Annual parish recognition Mass/event for society members (A)**
- 14. Estate Planning Seminar (every 2-3 years)**
- 15. Parish specific Planned Giving brochure (pamphlet rack)**
16. Add planned giving information in all new parishioner welcome packets (regular)
17. 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) (A)

18. Letters from parish ministry leaders to the ministry members (every 2 years)
19. Presentation to parish ministry meetings (every 2 years)
20. Send a letter and brochure to parish households to introduce the parishes existing endowment (s) (A)
21. Develop a memorial giving program for the parish (regular)
22. Add letter about planned giving as an insert in the IRS Tax Letter that gets mailed in January (A)
- 23. IRA letters to parishioners 70 and above (A)**
24. Table after Mass, in Narthex, or at parish events with planned giving materials.

KEY:

W = weekly

M = monthly

Q = quarterly

S = twice a year

A = annual