



Foundation of the Diocese of Charlotte

Parish Planned Giving Committee Promotion Ideas

1. Direct invitation letter from pastor and/or PPGC member
2. Planned giving information in bulletins on weekly basis
3. Planned giving information as bulletin insert occasionally
4. Planned giving information in parish newsletter
5. Endowment information in bulletins on a regular basis
6. Periodic Pulpit announcements
7. Establish Parish 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 and/or mailings
10. Listing of new Legacy Society members in bulletin or on plaque
11. One or two mailings per year on planned giving topics with planned giving brochure and return card included
12. Annual Planned Giving Sunday with in-pew cards and parish speaker
13. Annual parish recognition event for society members
14. Estate Planning Seminar every 2-3 years
15. Parish specific Planned Giving brochure
16. Add planned giving information in all new parishioner welcome packets
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)
18. Letters from parish ministry leaders to the ministry members
19. Presentation to parish ministry meetings

20. Send a letter and brochure to parish households to introduce the parishes existing endowment (s)
21. Develop a memorial giving program for the parish
22. Add letter about planned giving as an insert in the IRS Tax Letter that gets mailed in January.
23. IRA letters to parishioners 70 and above.
24. Table after Mass, in Narthex, or at parish events with planned giving materials.
25. Either list and describe your endowments in the parish bulletin or newsletter or provide information about the impact of your endowments.
26. Take the opportunity to thank parishioners who are remembering the parish (even if they have NOT self-identified) through their estate plan via parish communication outlets and events / functions.