



Planned Giving Seminar Parish Timeline

1 Month before seminar - start promoting seminar in your parish:

- Every week pastor makes announcement at Mass; promote on website and parish bulletin; post flyers around parish. Since most people do not RSVP, many parishes have been providing and announcing an RSVP sign-up table after Mass.
- **Parishioners respond best when pastor announces the importance of this educational seminar and ask for RSVPs.**
- Notify parish office that they will be receiving RSVP's so they are prepared and can answer general details – give them copy of invitation and RSVP form. There could be Catholics from a nearby parish looking to RSVP.
- Invite ministry volunteers (share invitation with parish committee members and ministry leaders).

2 Weeks before:

- Email Rosie Camous - rcamous@cfocf.org to order folders/materials (for in-person seminars only.)
- Continue to announce seminar at Mass and provide RSVP sign-up table.

1 Week before:

- Review RSVP count to: order food/beverages; determine setup for **seating (so all can easily see speaker(s) and presentation)**, microphone, screen and projector (for in person seminars only.)
- Pastor announces seminar one more time. Have an RSVP sign-up table after Mass.
- Prepare handout packets (one folder per family) – materials for folders will come from The Catholic Foundation.

Day of Seminar:

- Set up registration table with sign-in sheet, seating, projector; laptop; microphone; handouts; refreshments.
- The Catholic Foundation representatives will arrive approximately one hour prior to the start of the seminar to setup presentation and test equipment. (Speakers are asked to arrive 30 minutes prior to the start of the seminar.)
- Greet, sign-in attendees and handout folders.

After seminar:

- Follow up with requests for meetings or more literature/information.
- Continue to promote Legacy Planning, offering brochures in the parish narthex and providing monthly bulletin announcements.