



## Planning your Legacy Sunday Timeline

Raising awareness is the key to planned giving. Here's a suggested plan for creating an event that will update leaders who are already onboard and draw in others in your church.

Scheduling an adult forum before or after a Sunday worship service will provide an opportunity to gather the people who are interested in learning more about leaving a legacy gift to the parish. Materials from Episcopal Church Foundation can help attendees learn more, and you can always refer questions to ECF staff.

### Starting now

- Determine which date – All Saints Sunday, a patronal feast day, or another selected date – will be your best choice to celebrate Legacy Sunday.
- Be sure to touch base with the stakeholders in worship and program planning about the date and the celebration being planned.
- Begin to line up volunteers to work with you to help the day go smoothly.
- Begin the work of discovering a person who has either included the church in their will or created some other planned gift. You're looking for someone who might be willing to speak during the Legacy Sunday forum for 3 minutes about why they chose to remember the church in their estate planning. The rector, the treasurer, and/or the parish secretary might be able to offer suggestions.
- You may want to have an article appear in your church newsletter or bulletin, or an announcement in a service leaflet. Begin composing those now (or enlist a volunteer to help you), using verbiage drawn from ECF's Legacy Sunday [website](#).

### Two full months before your selected date

- Confirm the Legacy Sunday celebration date with church leaders. This includes informing the congregation of the upcoming event and getting various volunteers in place to oversee the day.
- Choose a Legacy Sunday leader to oversee the events of that day.
- Choose someone to emcee the Legacy Sunday adult forum and confirm the agenda with him/her.
- Decide what "hospitality" elements (food, beverages, etc.) your congregation might want for the adult forum, and coordinate with volunteers who can oversee that element of the day.
- Decide which one of ECF's webinars you'd like to use at your adult forum. Options suggested on the [agenda](#) are "[Making a Planned Gift to your Parish](#)" or "[Planning for the End of Life.](#)"

- Open the [links](#) provided for printable materials and download your selections. Be sure to update them with your church name and logo and check with your church office staff on how to get them printed.
- Order or download [ECF materials](#) for distribution at the adult forum on Legacy Sunday.
- Confirm your Legacy Sunday adult forum speaker (mentioned above) and offer to meet with them about their talk. Make the webinar you'll be using available to them, if they want to see it prior to Legacy Sunday.
- Confirm with your priest the readings for Legacy Sunday and that he/she will preach on that day about leaving a planned gift to the parish. Connect him/her with the resources on the Legacy Sunday [website](#).
- Confirm with church office staff the due date for you to supply copy for articles, notices, or bulletin inserts in advance of your chosen date.

#### Four weeks before Legacy Sunday

- Reconfirm with office staff the submission dates for articles, announcements, and/or bulletin inserts.
- Reconfirm with the person who agreed to speak at the Legacy Sunday forum and reconfirm time to speak.
- Double check that the space to be used for the forum has been reserved, and that you'll have the equipment you need.
- Remind your support team of their commitments.

#### Last 2 Sundays prior to Legacy Sunday

- Remind people at announcement time that Legacy Sunday will take place on your selected date.
- Invite people to join you at the Legacy Sunday adult forum.

#### Before Legacy Sunday

- Test a projector or monitor and the location's internet connection for playing the ECF webinar at the adult forum.
- Reconfirm the availability of the room and the volunteer who will speak about why they chose to make a planned gift to the congregation.

#### On Legacy Sunday

- Set up all equipment before adult forum and do a final test on connectivity.
- Collect the names and e-mails of all who attend the adult forum for future follow up by the Planned Giving Shepherd.

#### Soon After Legacy Sunday

- Consult with your church leaders about how you want to follow up, both in terms of individual attendees and in scheduling any future events.
- Consider creating a team to carry on the work of planned giving.
- Celebrate the beginning you've made in funding future ministry.