

## How to Create a Legacy Society Brochure

*For more information, see Funding Future Ministry Chapter VII Establishing a Legacy Society and Chapter VI Educating Your Congregation.*

Creating an effective Legacy Society brochure is essential to build awareness and to invite new members.

Effective brochures need to be both persuasive and informational. Try to keep a balance between the two. Remember, the ultimate goal is to encourage people to join the Legacy Society. Give them a way to respond.

- They need a reason to join (persuasive)
- They need to understand how to join (informational)
- They need explicit directions to pursue next steps (response)

### Brochure Cover

Wording for Cover

- *An Invitation to Join (name of Legacy Society)*

Artwork and Pictures for cover

- Legacy Society or church logo
- Picture or drawing of the church or other image that is recognizable to parishioners

### Brochure Content

The brochure should cover the following.

#### History and Purpose of the Legacy Society

Include brief information about the history and purpose of the Legacy Society. Answer the following questions:

- Is the Legacy Society named after someone?
- What was his/her/their compelling contribution to the parish?
- When was the Legacy Society established?
- What is its purpose?

Sample text: *The purpose of the Society is to recognize those individuals and families who have remembered St. Swithin's Church in their estate plans through a documented planned gift. More so, the Society serves to enable members and friends to witness to the value of St. Swithin's in their lives and secure its ministries for generations to come.*

## **Vision for the Legacy Society**

Share the vision for the Legacy Society.

Sample text: *Gifts to the Legacy Society are acts of hope for the future of our parish. Through God's grace and your generosity, St. Swithin's will be well equipped to serve our community in generations to come... (continue along this theme)*

## **The Benefits or Rewards of Membership**

Consider the spiritual rewards of giving.

Sample text: *We give out of our treasure today to bless others in the future... (continue along this theme)*

Describe the benefits and honors of membership in the Society.

Sample text: *Every year, names of new members of the Legacy Society will be added to a plaque displayed in the church narthex. All Legacy Society members will be honored at an annual members dinner. Members will also be invited to seminars and special events on planned giving, financial and estate planning.*

## **Becoming a Member**

Encourage a planned gift to the Legacy Society.

Sample text: *You may become a member of the Legacy Society simply by notifying us that you have named St. Swithin's Church a beneficiary in your will or estate plan.*

You may also require members to sign a declaration of intention. If so, include that information and direct them where to obtain the Legacy Society enrollment form.

## **Forms of Planned Giving**

Include a brief description of the types of planned gifts.

Sample text:

- **A Bequest in a Will:** *The easiest and most common way of making a planned gift is through a bequest in your will. You can designate a specific amount of money, a percentage of your estate, or a specific asset. St. Swithin's could also be named as a contingent beneficiary.*
- **Life Income Gifts:** *Gifts such as a charitable gift annuity, a charitable remainder trust, or a pooled income fund provide you and/or your designated beneficiary income for life. Upon your passing, the church receives the gift. Life income gifts generally reduce or eliminate certain taxes and guarantee an income for life.*
- **Life Insurance:** *Life insurance can be used to make a sizeable gift to St. Swithin's. For example, you can purchase a new policy and make the church the owner and beneficiary of the policy. You can make St. Swithin's the owner and beneficiary of an existing policy you no longer need. Or you can name St.*

*Swithin's a contingent beneficiary of an existing policy. Your life insurance could "endow" your annual pledge to St. Swithin's.*

- *A Life Estate: You can deed your home, vacation property, or condominium to St. Swithin's and retain the right to live in the property and/or receive income from the property for as long as you or your beneficiaries live. A life estate gift reduces capital gains, inheritance and estate taxes and offers an income tax deduction as well.*

Consider including how planned gifts can be funded.

*Sample text: Depending on the type of planned gift, different assets may be used to fund it. Cash, appreciated securities, appreciated property, or personal property (such as jewelry or art) may be options. Check with your financial and legal advisors before making a gift.*

## **Designating Your Gift**

Tell how you accept or encourage designated gifts. If your endowment fund contains designated fund opportunities, you may want to include this information.

*Sample text from Calvary Church, Summit, NJ: A planned gift to Calvary goes to The Heritage Funds, which have been designed to allow you intentional control over what happens to your gift. You can select the particular fund into which your gift will go:*

- *The Premises Fund: for the maintenance and repair of the buildings and grounds, and for projects of enduring character.*
- *The Christian Mission Fund: for support of worthy organizations furthering the mission of the church, and for scholarship and outreach projects.*
- *The Christian Education Fund: for the teaching ministry, including work with youth.*
- *The Parish Life and Music Fund: for the enrichment of worship, music, fellowship and lay ministry and for the enhancement of the organ.*
- *The Remembrance Fund: for memorial gifts and "in lieu of" contributions, to be used for worthwhile purposes.*

## **Testimonials (if desired)**

You many want to include a compelling quote or brief story from parishioners to encourage others to follow their example, similar to those below.

- *"St. Swithin's has been our spiritual home for 50 years...we want it to bless others in the same way. That's why we've joined the Legacy Society."*

- “*For me, the Legacy Society is my connection to generations of St. Swithin’s parishioners—past and future. I’m excited to take my place in our history.*”
- “*I realized that giving of “my treasure” isn’t limited to my earthly lifetime. By joining the Legacy Society, I can continue to bless the church for years to come.*”

### **Response card (this section of the brochure would tear off)**

Clearly direct parishioners to respond.

- Include space for people to write their name/address/ phone/email.
- Provide a contact person for returning the form to the church, e.g. Chair of Legacy Society.
- Make sure church address, phone, website information is clearly visible.
- A response card should include clear options about giving.

Sample text:

*I am/we are interested in learning more about the Legacy Society and planned giving options. Please send me/us information on the following (check as many as apply):*

*Bequest in a will*  
 *Life income gift*  
 *Life insurance*  
 *Life estate*  
 *Other*

*I/we would like to speak to someone confidentially about legacy stewardship*

*I/we have already made provision for a planned gift to St. Swithin’s as indicated above (please check appropriate box).*