

Planned Giving Tip
October 2005
How to Obtain More Bequests

Every once in awhile I run across an article that is practical and helpful. For the next several monthly planned giving tips, I will share excerpts from an article titled "How to Obtain More Bequests" written by Roger Schoenhals. Roger is the publisher of "Planned Giving Today" which is an excellent monthly newsletter to non-profits. The article has 19 tips/suggestions that hopefully will spark some action on your part which, in turn, will lead to more bequests. I have taken the liberty of adapting his ideas to a parish setting:

1. CREATE A WILL INFORMATION KIT

A will information kit is a ready-to-go packet of material that you distribute to those who have checked off on your weekly envelope or through some other means requested information on how to remember the parish in their estate plan. (If you have not yet included the check off on your envelopes, perhaps now is the time to do so. We receive many inquiries from check offs on DS and combined appeal envelopes). The kit includes a letter from the pastor, a brochure on wills and estate planning (I can personalize a wills and endowment brochure for you), sample bequest language with the correct legal name of your parish; information about the Heritage Society for planned giving donors (again, if you haven't done this yet, this should be a priority for next year!); and a response card perhaps attached to a business reply envelope.

The items in your Kit should be attractively prepared and placed in a 9"X12" envelope. Once someone requests your Will Information Kit, send it out immediately...and then follow-up with a phone call a week later. Give me a call if you need help.

2. ENCOURAGE YOUR COUNCILS TO TAKE THE LEAD

In an ideal world, the pastor and all members of the Finance and Pastoral Councils would make provisions for the parish in their estate plan. Some suggest that it be a prerequisite for council service. After all, asking others to include the organization rings hollow unless the parish leadership takes the lead in this area. One way to encourage this is to distribute a "job description" for new members that includes remembering the parish in their estate plan as part of the expectation of involvement. Even if it is only a contingency bequest, the fact that each member's will bears the parish's name will do more to inspire imitation by others that just about anything else.

3. PRINT REMINDERS ON GIFT RECEIPTS

Every time someone makes a gift to the parish that requires a receipt, why not print the following words at the bottom of the receipt: "Please remember ABC Parish in Your Will". It doesn't cost anything extra to do this, and it provides a gentle reminder to those who care enough about the parish to make a substantial gift that requires a receipt!

4. USE THE BULLETIN

Who reads the bulletin? Your elderly parishioners do! Dedicate one or two pastor letters a year to wills and estate planning. Focus on what could be done at the parish if EVERYONE remembered the parish in their will. If you have a stewardship corner, make sure that there are Wills messages at least once a month (If you don't have my collection of bulletin messages, I can email them to you). Use the bulletin to announce bequests that have come in, and what the parish plans to do with the gift. Put "Please remember ABC Parish in Your Will" somewhere in the bulletin every week... Perhaps even in the blank ad spaces.

More ideas to come in November...

Keep planting seeds. It works!