

## Planned Giving Tip

November 2005

Last month's tip had four simple ways to promote bequests from an article titled "How to Obtain More Bequests" written by Roger Schoenhals, the editor of the newsletter "Planned Giving Today."

Here are four more ideas from his article:

1. Place ads in the local media. Consider providing a boxed "ad" to local newspapers (maybe the obit section) that contain a message similar to "Remember to Include ABC(Parish) in Your Will." (Use the Observer, too) Or perhaps you could do a series of ads with each one featuring a photo and the caption, "We included ABCParish in our will." The display ads don't need to be large to be effective. A more important feature is frequency. Throughout the year, you might also run 15-second spot ads on the radio with words something like this: "Leave a lasting legacy through your will. Include a bequest to ABCParish. For a free Will Information Kit, call (number)."
2. Include a button on Your Web Site. Your (parish) likely has a web site. The home page could discreetly include the words "Please remember ABCParish in your will," with a hyperlink to the planned giving section (of the diocesan web site <http://www.osdrfd.org/pg/pg.html>) where further information is available. Or you could do something like, "For a free Will Information Kit, click here." Offer your free kit by mail, and also make it available as a pdf file for those who want to print it out. More and more seniors are using the internet, and your site should be ready with attractive and compelling information about planned gifts in general and bequests in particular.
3. Sponsor estate planning seminars. These seminars can include a local estate planning attorney talking about the basic ingredients of a sound plan, followed by (John Sentovich's) presentation on planned giving. Sometimes it works best to target these seminars to special groups, such as widows and retired couples.
4. Mail Annually. At least once a year, send a bequest mailing to all members (of the parish), asking the recipients whether they have named your organization in their will and, if so, in what way. You will find new names popping up from every mailing, providing you with new inductees into your Heritage Society. These respondents deserve a follow-up visit (or phone call) soon and a concerted effort of sincere cultivation.

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It's not too late to inform your parishioners about KETRA...Put the following in the bulletin until the end of the year:

Because of the Hurricane Katrina legislation (KETRA), cash contributions to qualified charitable organizations are now deductible up to a total of 100% (normally 50%) of adjusted gross income through December 31, 2005. Excess charitable deductions can be carried forward up to five additional years.

Keep planting seeds.