

Planned Giving Tip

March 2006

Wills Seminar Example

On Saturday, March 11, St. Edward Parish in Rockford hosted a wills seminar from 10 a.m. until noon. This was the first seminar the parish had conducted since 1998. 46 parishioners pre registered for the seminar and 43 actually attended. Pat Agnew, a local estate planning attorney made an excellent presentation on wills and estate planning, and answered the basic question: When it comes to my final estate plan, do I need a will or a trust? (To find out the answer, call me and we'll organize a seminar at your parish!)

I made a presentation on the various ways parishioners can remember the Church in their estate plan and highlighted some individuals that have already done so. It was very similar to seminars that have been conducted in the past...except for the turnout.

Typically we have anywhere from 15 to 25 people attend these seminars (I have seen as few as 3 and as many as 150). Most parishes that conduct them receive the "6 Steps to Conducting a Wills Seminar" from our office that provides ideas on how to achieve a high turnout.

Of all of the ideas in the 6 Steps booklet, the most important is the personal invitation by the pastor to the targeted group he desires to attend. Why? Because it demonstrates to the invitees that this is a serious priority for the parish. Father Michael Black, St. Edward's pastor, announced at the end of the seminar that he signed 360 invitations and wrote personal notes on each letter. He was hoping that 10% of the invitees would attend; he was grateful that it was closer to 12%, and it was a Saturday morning!

Congratulations to Father Black and his staff for a job well done and providing an excellent example of how to conduct an effective wills seminar. 43 people at his parish now have a better understanding of how to ensure that their estate will be properly distributed to family and to charity upon their death. See the [generic copies](#) of Father Black's letter, flyer and reply card that he mailed to his parishioners.

Keep planting seeds!