

Planned Giving Tip
January 2007
Planned Giving Committee
Evaluating Your Efforts

Ask yourselves at the end of each year:

Ongoing education

Do we, as a committee, have a better understanding of the planned giving message, both from a practical and a spiritual perspective?

Have we taken time during the year, at Finance and Pastoral Council Meetings, to educate other parish leaders about planned giving?

Do we better understand how planned giving fits into the overall mission of the parish?

Charitable Gift Annuities

Has anyone included the parish or school as the remainder of their gift annuity? (Contact Office of Stewardship Development)

Did we receive more inquiries about gift annuities than last year?

Have we given the majority of people over 65 in our parish an opportunity to understand how a gift annuity works?

Have we contacted the senior group in our parish with this gift giving opportunity?

Wills and Seminars

Did we receive any bequests this year? Can they be attributed to any of our efforts (i.e. did they attend one of our seminars in the last several years or has someone met with them personally to discuss the distribution of their estate)?

Did our attendance at this year's seminar exceed last year's? If yes, what do we attribute it to? If no, do we need to make some changes for next year? (i.e. change time, topic or audience)

End-of-Year Giving

Did December's gifts of \$250 or more grow over last year?

Did we receive more end-of-year gifts of appreciated stock than last year?

Miscellaneous

(Ongoing) Have we introduced a new idea this year? (i.e. letterhead idea, new bulletin insert, different type of seminar)

Have we established a giving society with an annual thank you Mass and Brunch?

If we have a Foundation account, are we promoting gifts to it on a regular basis? Do all of the attorneys, CPAs, and Financial Planners in the parish know about our account?

Do we have accounts at local brokers to facilitate the transfer of stock?

Was the message of planned giving shared at least once from the pulpit this year?

Have we contacted another parish in the Diocese recently for some fresh ideas?

Keep planting seeds!