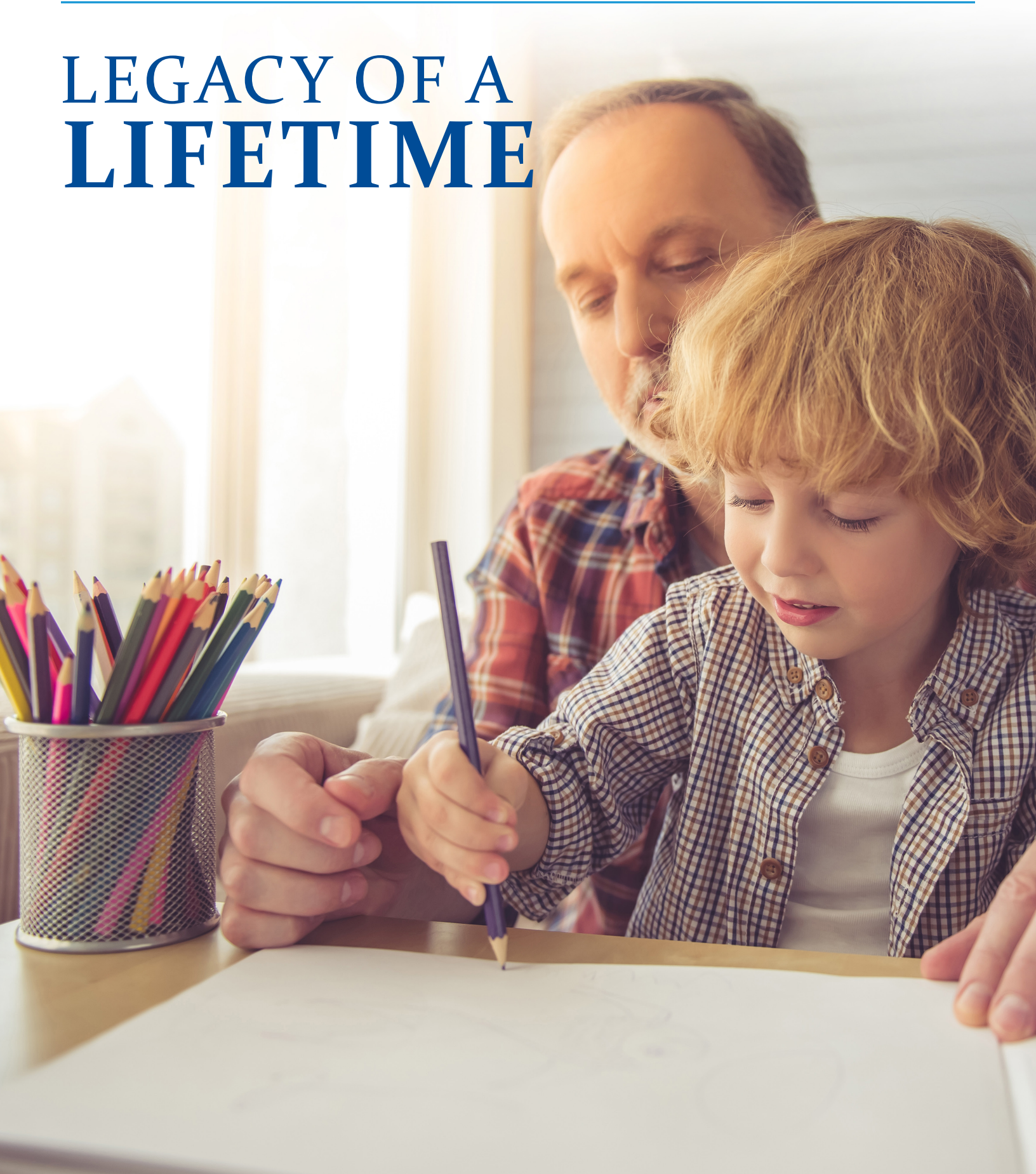


LEGACY OF A LIFETIME



WELCOME TO THE LIVE FORWARD, GIVE FORWARD® PROGRAM

What if you could get church members to enjoy being good stewards in ways that keep your mission going – and growing? What if they got excited about laying a foundation for vibrant new outreaches that changed lives? And what if they embraced the opportunity to fund the future through a simple gift in their wills? What if they established a permanent endowment fund in honor of a loved one or set up recurring gifts with a donor-advised fund?



IT CAN HAPPEN

As part of the Live Forward, Give Forward® Wills and Legacy Giving Program, this kit is designed to make it easier for you to communicate with the people in your church about the power of bequests and other giving options.

The resources here can be used to put together a practical, year-long communication plan in just one day. Why year-round? By making the subject of wills and legacy giving part of a natural, on-going conversation, you can:

- remove some of the barriers to discussing incapacity or mortality.
- explain how planning a legacy gift is a simple, joyful way to carry values forward to the next generation.
- show that planning for end-of-life issues is a faithful act of Christian stewardship.

Take the steps necessary to create a program to encourage your members to make legacy giving a vital part of stewardship. Churches with a Wills Emphasis program report receiving a higher percentage of gifts from bequests than those without a program.

WHAT'S IN THE KIT

Program Leadership Guide - Page 4

Helpful tips to make it easy to plan an effective program, create a communication plan, then carry it out all year long.

Legacy Vision Worksheet - Page 6

To help you articulate a compelling future vision for your church that inspires people to support it.

Communication Plan - Page 7

A simple guide and tips to help you promote bequest and legacy giving throughout the year.

Ideas to Promote Your Program - Page 14

More ways you can incorporate bequest and legacy giving messaging throughout the year.

ADDITIONAL TOOLS AND SUPPORT

Overview of Gift Plans - Page 9

information about gift plans that allow immediate use of funds to support ministries and other gifts that are planned now, but that provide support after the lifetime of donors.

Touch Points - Page 12

Quotes, statistics, questions, and more that can be used to communicate about bequests and legacy giving via social media posts, newsletters, bulletins, and emails.

Bulletin Insert - Page 15

Downloadable insert you can use on Wills Emphasis Sunday, or for any Sunday you choose.

Posters - Page 15

Two downloadable posters you can print and use to promote Live Forward, Give Forward.

The Presbyterian Foundation's Ministry Relations Officers (MRO) are available to work with your church leaders to cultivate generosity and promote stewardship. They can help with this guide and other services to build your wills and legacy giving program and help you find fiscal success. You can find your MRO at presbyterianfoundation.org or by calling 800-858-6127.

LEADERSHIP GUIDE

The Presbyterian Foundation is committed to strengthening congregations by cultivating and managing the financial resources of individuals and institutions to serve Christ's mission. We support the efforts of individual churches to encourage gifts through charitable estate planning and lifetime giving.

Enabling Presbyterians to change the world with their accumulated assets in accordance with their values is at the core of our existence. Members identify the areas of mission for which they have a passion – their local church, global, national or hometown mission – and our staff assists in discovering ways to give that best meet their needs and the needs of missions they choose to support.

DEVELOP A WILLS AND LEGACY GIVING PROGRAM

A wills and legacy giving program that encourages giving through charitable bequests, permanent endowment funds and other estate plans enables your members to share God's material gifts with the church and help fund its mission.

As a church leader, you are in a unique position to educate members in the variety of ways they can support your mission and offer them opportunities to practice exceptional stewardship. Wills Emphasis is an ideal way to introduce your congregation to the concept of legacy giving, and offers a solid model for developing a more complete program. Making a gift through a charitable bequest provides members with the assurance that they will continue to have complete control of their assets during their lifetime and the satisfaction of knowing their will reflects their faith and stewardship values.



PLAN AN EFFECTIVE PROGRAM

As you design your wills and legacy giving program, this guide will help you set the foundation for an effective program.

- 1. Assemble Your Leadership Team** – Organize a program team to provide consistent leadership and clear communication. Involve people from your Stewardship Committee, and those who can be enthusiastic champions of the program to various segments of the congregation. Include a mix of skill sets and relevant experience. Then, let the team take on the project and exercise ownership.
- 2. Create a Legacy Vision** – People need to know why they should give toward the future. Use the Vision Worksheet to help the team create a compelling, passionate, ambitious, yet realistic statement of the future of your church's mission.
- 3. Set a Goal** – What is it you hope to accomplish with a Wills Emphasis or legacy giving program? Do you want to establish an endowment fund, or encourage gifts that will support an initiative? How many commitments to include a bequest do you expect to receive each year? What is your timeframe? How will you measure success? Answering these questions can help the team determine clear, measurable program goals and help guide the development of a communication plan. It may be helpful to break down goals by groups – Session members, choir, or members who have given faithfully for three years or more.
- 4. Develop / Refine Gift Acceptance Policies** – Do you have guidelines in place for the types of gifts that will be accepted? Do you know how gifts of securities or property should be addressed? How will these gifts be invested and used? These are important issues that need to be resolved in advance. You will probably need to set up separate meetings with additional team members, and perhaps Session members, to explore these issues, and to make sure you understand the legal and tax implications for different kinds of gifts. The Ministry Relations Officers have sample gift acceptance policies.
- 5. Know Your Congregation** – Knowing the age, gender, marital status, income and education levels, length of membership, active and past leadership roles of your members is important, but you also need to understand their needs and desires for mission, as well as their giving patterns. People who make annual gifts at least three years in a row are more likely to make a bequest when asked. Understanding this kind of information can help you target your efforts and your communication to the most likely donors.
- 6. Determine Program Logistics** – These are the nuts and bolts of how the team will launch and run the program. After defining your goals and the composition of your congregation, you can begin establishing your plan structure. How much time can you devote to this program? What will the meeting schedule be? What are the specific responsibilities of each team member? What is the timeframe for achieving goals, and what are the milestones along the way?
- 7. Create a Year-in-a-Day Communication Plan**
A communication plan is key to an effective program. It should include all intended means of communication, including a calendar of events and overall goals. Good communication is about more than mailings and asks. Set aside one day with your program team, to brainstorm and plan various ways you can cast the vision for living forward and giving forward all year long. The Communication Plan on page 7 offers tips, and the Foundation's Planned Giving Navigator offers additional communication tools to talk with your supporters about ways to make a gift to your church.
- 8. Make Personal Contact** – Have a plan to follow up with anyone who shows substantial interest in making a gift, whether it is an immediate gift such as a permanent endowment fund or a deferred gift such as a charitable trust. A Presbyterian Foundation Ministry Relationship Officer can work with members to help them realize their dreams for the church through their giving. Prospective donors should always be encouraged to seek the counsel of their attorney or financial advisor.
- 9. Recognize Donors** – Recognition and thanks are key elements in a stewardship program. Thanking donors may also encourage others to consider including a charitable gift in their estate plans. Be sure to respect the wishes of individuals that prefer not to be recognized publicly.
- 10. Grow Your Program** – Once your wills and legacy giving program is up and running, keep communicating with your congregation and keep it top of mind. Developing and implementing a Live Forward Give Forward® program offers a multitude of opportunities for financial stewardship and sharing.

LEGACY VISION WORKSHEET

The need for legacy gifts needs to be clear – to everyone. This means our organization needs a compelling, passionate, relevant, ambitious, realistic future vision.” – David Love, Agents of Good.

Live Forward, Give Forward® is about encouraging people to provide for the long-term mission of the church. To understand how the way they give now can have future impact, they need a compelling vision of what that future can hold. This goes beyond programs, facilities, and general operating budgets – they need to know what their investment in the mission of the church will help accomplish 10, 20, 50 or more years down the road.

Draft an inspirational legacy vision, in 300 words or less, that explains the need for bequests and legacy gifts and shows the difference that such gifts can make to build and protect the future of the church. Then incorporate this vision into your communication materials, messages, and presentations.



These questions can help you get started.

QUESTIONS TO ASK

- How do you see your church’s role in the community now? What do you want it to be?
- Is there a particular group or need that your church is committed to?
- How will your commitment grow or change in the future?
- Is there a group or need that is not being addressed yet?
- What would it look like for your church to begin to address it?
- How will gifts made in wills and other legacy gifts contribute to realizing this vision?

LEGACY VISION STATEMENT

COMMUNICATION PLAN

It is important to have a year-round communication plan. People make their wills and legacy gifts based on life events, not calendar events.

THE MOST COMMON LIFE TRIGGERS ARE:

- Marriage
- Birth of a child
- Onset of serious illness
- Significant change in financial situation
- Purchase or sale of property
- Retirement
- Late in life to get affairs in order

TAKE THE STING OUT OF LEGACY GIVING TALKS

Legacy giving is not about death – it’s an affirming experience that celebrates the people, values, and goals that people cherish most. There is never one “right time” to talk about wills and legacy giving. When you make Live Forward, Give Forward® a regular part of the giving and stewardship conversation, it will become more natural for your leadership team to talk about wills and legacy giving, and for your congregation to overcome reluctance to think about them.

CAST THE VISION FOR THE FUTURE

People give for many reasons – find ways to tie those different motivations to your church’s mission in the future. Possible motivations:

- helping those who have less
- leaving a personal legacy
- making a better future
- supporting their church family

SHARE HOPE AND JOY FROM SCRIPTURE

Many Biblical passages underscore the joys of giving, our call to take care of God’s earth and people, and the promises of life to come ...

- Choose one or two passages that truly speak to you and your congregation.
- Let the Holy Spirit work through those passages and you to help people see the importance and power their gifts could have on ministries closest to their hearts.

TELL STORIES

People want to know that their donations will have an impact.

- Tell the stories behind the bequests that are making a difference to your church today.
- Let other givers share their stories about why they are choosing to bless the church with a legacy gift.

SHARE THESE STORIES IN DIFFERENT WAYS

- Written – in newsletters, bulletins, emails, donor letters, etc.
- Testimonial – let people share their story during a sermon, minute for mission, workshop, or class. Also, put together short videos that can be shared on your website, online video channel and in emails. No need for high production levels – video captures from a smart phone work just fine!

ASSURE THEM THEY DON'T HAVE TO BE RICH

Many people assume that they need to be wealthy to make a bequest or legacy gift. While large gifts certainly help, they are the exception, rather than the rule. The widow's offering in Luke 21 reminds us that it's not the size of the gift, but the measure of faith it represents.

- Let people know they can give smaller amounts that will be invested so they'll grow over the years to come – and that it doesn't cost them anything now.
- Be sure they know they can give from other assets such as retirement accounts, life insurance, and real estate.

ASK

The primary reason people don't make bequests is that no one has ever asked them, or let them know you need their help.

When faithful givers are asked to make a bequest, most are quite likely to say yes. While seeking a bequest can

be a lengthy process, when it comes time to ask, don't shy away. Keep the request simple. Those who serve on the Committee or who ask people about making a bequest should be people who have included the church in their own will and be prepared to discuss it.

SAY THANK YOU

Thank donors and prospective donors often.

Follow-up on any contact you have, and thank them for their time, interest, input, etc.

If they decide to make a gift, write a personal note thanking them for that decision, and reinforce the vision they are supporting.

Ask donors if they wish to be publicly acknowledged, either through your recognition program, or by a notice in the bulletin or newsletter.



HOW TO SAY IT

USE CONVERSATIONAL LANGUAGE

Stay away from formal language and jargon.

Make it simple, clear and conversational.

USE A JOYFUL TONE

With a will or legacy gift, people can give the way they want to live – by making a better future for their loved ones and a lasting impact on their faith community.

OVERVIEW OF GIFT PLANS

There is more than one way to achieve charitable giving goals. When considering specific charitable planning, the Presbyterian Foundation recommends consulting with legal and financial advisors to discuss plans and potential tax advantages.

Permanent Endowment Funds – provide income in perpetuity to the church or a chosen mission. The fund can be established during the donor's lifetime or through a bequest.

Donor-Advised Funds (DAF) – are like an online charitable checkbook and make giving convenient and flexible. An irrevocable gift, a DAF provides an opportunity to teach and share philanthropic values with children or grandchildren, and creates a legacy of generosity. The donor can fully manage the fund online, including making grant recommendations and additions to the fund.

Charitable Remainder Trust* – allows the donor to make a future gift to the Church or its mission while receiving income during his or her lifetime. The trustee manages assets and makes payments to the income recipient. When the income payments end, the remaining trust assets become available for the work of the Church according to the donor's wishes.

Charitable Lead Trust* – appeals to individuals who may be subject to a large estate tax. The charitable beneficiary named by the donor receives payments from the trust, usually for a set term of years. At the end of the term, the trust assets are returned to the donor's estate or passed on to heirs.

Charitable Bequests – are made through a donor's will. A will can be written to accomplish a variety of needs, such as benefiting family and friends. It can also fulfill a desire to support a mission or program. Bequests can be made directly to the church or made to the Presbyterian Foundation to establish a permanent endowment fund to benefit the church.

Life Insurance – naming the church as the beneficiary of a life insurance policy may offer benefits, an opportunity to make a gift where other options are not feasible, and allows a gift to pass outside of probate. Policies may no longer be needed or serve the purpose for which they were originally intended, such as a business that no longer exists, or for children or loved ones who may not need the additional income. A gift of life insurance may allow the donor to establish an endowment type gift that may not have seemed possible under other circumstances.

Retirement Plans – have increasing importance to charitable giving. Designating a charitable beneficiary for retirement account(s) such as IRAs, 401(k)/403(b), Keogh and others may reduce income and estate tax liabilities for the donor and his/her heirs. A donor may also establish a charitable trust during his/her lifetime using assets from a retirement account.

Real Estate – can provide unique gift opportunities regardless of whether the property has increased or decreased in value. A donor may donate a home or other property that is no longer used or the donor does not wish to manage. A donor can also make a gift of a personal residence or farm property and still retain the use of it during his or her lifetime.

Pooled Income Fund – are gifts pooled together and invested under professional management. The individual receives a share of the net income based on their share of the pool. After the individual's lifetime, that share is withdrawn from the pool to support the designated Presbyterian mission.

* Trust services provided by New Covenant Trust Company, N.A., a subsidiary of the Presbyterian Foundation.

PLAN A YEAR-LONG STRATEGY

After the team sets a goal, gathers the necessary information, and crafts a Vision Statement, it's time to start planning ways to reach out and communicate with members.

WILLS EMPHASIS SUNDAY

Wills Emphasis Sunday is traditionally held on the first Sunday in May, but any Sunday you choose can be a launching point for your program. You can also plan a Wills Emphasis Sunday several times a year. A larger legacy giving awareness campaign can be integrated into every Sunday.

YEAR-ROUND

The *Touch Points* offer ideas for simple legacy giving reminders for weekly bulletins, email or print newsletters.

MONTHLY

Schedule monthly social media posts with helpful and interesting information about wills and other legacy gifts, as well as the vision for your church's future. The *Touch Points* offer ideas.

1ST QUARTER

Send an annual bequest and legacy giving reminder letter to all church members. Follow up with a special letter to those who have been giving consistently for at least the past three years – they are most likely to make a bequest when asked.

SAMPLE LETTER

Dear [name],

First, I want to thank you for your faithful support of your church family and our shared mission. And to let you know why your generosity is so important, I'd like to tell you a story.

Back in the late 1600s and early 1700s, architect Christopher Wren was supervising the rebuilding of St. Paul's Cathedral in London, which took about 50 years to finish. One day he asked three different laborers on the project what they were doing. They had no idea who he was, and each answered honestly. One said he was cutting stone. The second said he was earning six shillings. The third said, "I'm helping Sir Christopher Wren build a great cathedral!" That cathedral is still a beautiful, active place of worship today.

You may not realize it, but right now you are helping build something lasting and beautiful. More than just a physical structure or a series of programs, your support is building a thriving community that is making a difference in the lives of people in our church, in our neighborhood, and in the world.

To ensure this community continues, I'm asking you to consider making a legacy gift to the church. A bequest is a simple way for you to bless not only your immediate family, but your church family as well.

It's a way to live forward and give forward, blessing those who come after us through the choices you make today.

Just think – a gift that costs you nothing now can:

- give youth a safe place to gather and grow
- provide food and shelter to battered women in our city
- make our church more accessible to seniors
- enrich worship with music and art

The possibilities are endless – and exciting!

Thank you for everything you're doing to make this church – this community – a better place for all of us. And thank you for considering making a gift that will make our little piece of the world better – and more beautiful – for the next generation.

If you have any questions, or want to know more about making a bequest or other legacy gift, don't hesitate to contact me.

In Christ,

P.S. Making a gift of any size to the church in your will takes just a few minutes – and it can make a difference for generations. Please consider making a gift that gives forward to future members of our faith community.

2ND QUARTER

Add a bequest and legacy giving reminder to your Spring fundraising letter. It can be a short paragraph in the body of the letter, or included as the P.S.

3RD QUARTER

Include a “lift note” with your fall fundraising letter. A lift note is a secondary letter included with the main mailing. It should be smaller than the letter, be more casual in look and tone, and come from a different writer, such as someone who has recently planned a bequest or legacy gift and wants to encourage others to do so, or someone who has benefited from a bequest.

SAMPLE LIFT NOTE

Dear [name],

When Michael got back from church camp last summer, he was a changed guy. He went off a typical moody teenager, full of restless energy and questions about faith, God, and everything.

But when he came home — well, I hardly recognized him. He was smiling and his energy seemed more focused somehow. And you know what he said? “Dad, I get it now!” Michael’s time at camp brought him into a real relationship with God and into deeper relationship with his peers and youth leaders. And the reason that was possible? Because someone like you made a gift to our church in their will. That simple bequest helps keep our camp going - and keeps giving kids like Michael the opportunity to explore faith in a safe, fun environment.

Will you consider making a gift in your will? I’ve seen firsthand how that simple, generous gesture can change a life. Join with me in giving forward so that the next generation of Michaels can come home and say, “I get it now!”

With gratitude,

[name]

4TH QUARTER

Include a bequest reminder in your end-of-year donor newsletter or annual thank you letter. It can be a short story of how a bequest has benefited your church, or one of the *Touch Points*.

CONTINUING COMMUNICATION

Use the *Ideas to Promote Your Program* and begin brainstorming other ways you can incorporate wills and legacy giving messaging. With your team, put these ideas on your communication calendar.

	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
Activity				
Date				

TOUCH POINTS

Use these Touch Points to help people catch the vision behind your Live Forward, Give Forward® Wills and Legacy Giving Program. As part of your overall communication plan, use them in your bulletins, social media posts, newsletters and other outreaches to members of your faith community.

QUOTATIONS

- *I've learned that you shouldn't go through life with a catcher's mitt on both hands. You need to be able to throw something back.* — Maya Angelou
- *Deeds of giving are the very foundations of the world.* — Jewish proverb
- *What is the use of living, if it not be to strive for noble causes and to make this muddled world a better place for those who will live in it after we are gone?* — Winston Churchill
- *What we do for ourselves dies with us. What we do for others and the world remains and is immortal.* — Albert Pike
- *In our good works, nothing is our own.* — John Calvin
- *We are only trustees for those that come after us.* — William Morris
- *How lovely to think that no one need wait a moment; we can start now, start slowly changing the world!* — Anne Frank
- *I want to live in such a way that small gifts are meaningful.* — William S. Coperthwaite
- *Give what you have. To someone, it may be better than you dare to think.* — Henry Wadsworth Longfellow
- *Even if I knew that tomorrow the world would go to pieces, I would still plant my apple tree.* — Martin Luther
- *No man has a right to leave the world as he found it. He must add something to it: either he must make its people better or happier, or he must make the face of the world more beautiful or fairer to look at.* — Edward Bok
- *'Tis in the act of giving that we live.* — William Hall
- *We live in a world in which we need to share responsibility. It's easy to say 'It's not my child, not my community, not my world, not my problem.' Then there are those who see the need and respond. I consider those people my heroes.* — Rev. Fred Rogers (Mister Rogers)

DID YOU KNOW...?

- 61 percent of Americans don't have a will (Harris Interactive survey, March 2013). Reasons include, "Haven't gotten around to it," "It's not urgent," and "I don't have a lawyer."
- You don't have to be wealthy to bless the church with a gift in your will. Small amounts can be put to good use right away, or invested so they grow in the years to come.
- The word "bequeath" comes from an Old English word that means "to say, speak to, exhort." Making a bequest to the church in your will is a simple, effective way to speak into the future of your faith community, and encourage growth for the long term.
- You can give different kinds of gifts to the church in your will. You can give a dollar amount, or percentage, or real estate, stocks, business interests, artwork, and copyrights or royalties.
- Without a will, the distribution of your estate – no matter how small or large – is determined by the laws of your state. The state may not include all the people you would like to benefit, and it won't include any charities or religious organizations you wish to support. Have you made a will yet?
- A Harvard study showed that giving is contagious. It found that acts of altruism can spread by three degrees – from person to person to person. That means one generous act from you can influence dozens or even hundreds of people.
- A will is one of the simplest things you can do to make a positive impact on the future. Including a gift to the church in your will can make a lasting difference in our church family and our community.
- King David bequeathed assets to his son so that Solomon could build the Temple. His prayer: "But who am I, and who are my people, that we should be able to give as generously as this? Everything comes from you ... all of this abundance we have provided for building you a temple for your holy name, comes from your hand, and it all belongs to you." (1 Chronicles 29:14-16)

- Generosity is good for your health. The National Institute of Aging found that making charitable donations triggers the brain's reward center, which is good for your mental health. And volunteering can lower rates of depression, heart disease, and high blood pressure.
- Churches have a positive impact on their local communities. On average, congregations aid two direct service programs, two educational, health, or cultural programs, and one community development or political/social advocacy program – all of which helps the local economy, and the health and well-being of its people.

INSPIRATION

- The word “Give” appears 921 times in the bible – almost as many times as “Faith,” “Hope” and “Love” combined.
- Giving can be an expression of your faith in God, your hope for the future, and your love for others. Consider a legacy gift to your church.
- *“A legacy speaks not about how we died, but how we lived. It speaks about the things that move us in life, the things that matter to us. A legacy is an expression of gratitude and thanks to God for all that has been given and enjoyed in life.”* (Stewardship.org.uk) What will your legacy say about you?
- What kinds of mindful choices are you making today? Are you purposefully investing your time, skills, and money in ways that make the people and places around you better both now and for the future?
- Numerous studies have shown that churches have a positive economic, social, educational, and physical impact on their communities. You can be a part of that positive influence for years to come by making a gift to the church.
- Because of legacy gifts made to churches, kids have been able to go to youth camp, the hungry have been fed, and missions have thrived. What will a gift from you accomplish?
- *“But I will say this to encourage your generosity: the one who plants little harvests little, and the one who plants plenty harvests plenty. Giving grows out of the heart ... God is ready to overwhelm you with more blessings than you could ever imagine so that you’ll always be taken care of in every way and you’ll have more than enough to share.”* 2 Corinthians 9:6-8
- Bequest giving topped \$30 billion dollars in 2016.
- Making a bequest is easy and costs you nothing during your lifetime. Your assets remain in your control. After you make provisions for your family, you can give a gift to your church by including a bequest statement in your will. Gifts in your will may reduce or avoid potential estate taxes, leaving more for your family and the causes you care about.
- What part of church life means the most to you? Is there a ministry or program that has made a difference in your life, or a family member’s life? A legacy gift to the church can keep that vital aspect of our community growing so it can bless others in the future.
- Have you ever “paid it forward”? Bought coffee or paid the toll for the next person in line or given a gift to someone because someone had done the same for you? It feels good to take care of someone like that, right? A bequest is a simple, beautiful way to pay it forward for the next generation and take care of them in lasting ways.
- What are the five things that matter most to you? In addition to family, your list might include your church. Consider supporting those things that matter with a legacy gift.
- Generous living is about approaching each day with an open heart, an open mind, and an open hand. What can you do today to live more generously? What generous living choices can you make today that will make a difference in the future?
- *“Don’t hold back – give freely, and you’ll have plenty poured back into your lap – a good measure, pressed down, shaken together, brimming over. You’ll receive in the same measure you give.”* Luke 6:38
- What is your vision for the future of your church? What kind of needs could be met, or people served in 10, 20, even 50 years? You can help make that vision a reality with a gift to the church.

IDEAS TO PROMOTE YOUR PROGRAM

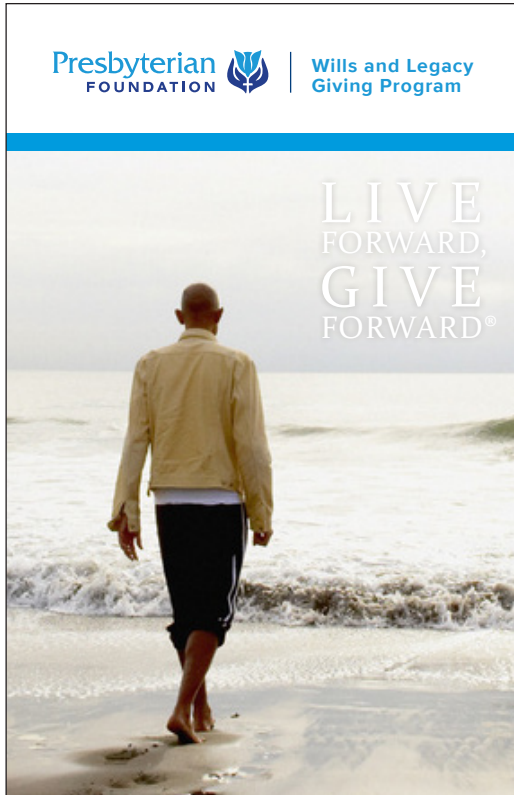
- Devote a **monthly column** to bequests and other charitable giving in your church newsletter or website.
- **Identify** the most positive promoter(s) of giving in your congregation. **Invite them** to be on the wills and legacy giving program.
- **Recognize** those who make a commitment and assist you with the program. The more positive promoters you can create in your church, the more the program will perpetuate itself. Invite members of the congregation to speak from their own experience about their decisions concerning financial stewardship and gift giving.
- Offer a wills or financial **planning seminar**. Continuing education is a must regarding legacy giving. A seminar is an excellent way to provide more detailed information to those interested in making a gift, and can show church members how simple it is to bless both their families, and their church with a legacy gift. If you would like assistance with a workshop, contact a Ministry Relations Officer.
- **Personal notes or postcards**, especially when handwritten, are always appreciated.
- Write a **special letter** to your regular annual donors and thank them for their faithfulness. Invite them to carry the mission they've been supporting into the future by making a gift in their wills.
- Giving is a very personal decision and people often shy away from traditional mass audience approaches. With the help of some stewards in your congregation, you can **create events** and situations that are more personal and low key.
- **Survey** the congregation to find out if anyone has named the church in their will or has plans to do so. You could also ask about the level of interest in additional seminars on lifetime giving or ideas on how to improve the program.
- Renew interest in the program each year on **Wills Emphasis Sunday**. In addition to promoting Wills Emphasis Sunday, make bequests and legacy giving a natural part of your teaching on stewardship and generosity. Include compelling stories and personal testimonies of why people have made bequests and the impact they've had on the church.
- Practice Live Forward, Give Forward. **Challenge your leadership team** to lead by example. As a leader, you can show members how easy it is to make a gift.

Support your new initiatives by ordering resource materials from the Presbyterian Foundation.


The only cost to you is the shipping and handling.


Visit www.PresbyterianFoundation.org to request your material.

BULLETIN INSERT AND POSTERS



Bulletin Insert - front


Wills and Legacy Giving Program

Live Forward, Give Forward®

Wills and Legacy Giving Program

How we live now affects not only our future, but the future of our families, our community and even our world. Whether it's through greener living, improving the community, or making life better for our children, the choices we make matter – both now and down the road.

Live Forward, Give Forward is about making a choice to live and give toward making a better future for those we care about - including our church family. And one thing you can do right now to help ensure that better future is to make a will that provides for your family and blesses your faith community's work.

Your home church believes in being able to meet people's needs through ministry in a few months, years, and even decades. Including a gift to the church in your will can help do that – without affecting your finances now. No matter how much you can give, with a bequest, you can strengthen your church family and make a difference for the future.

BEQUESTS HAVE THE POWER TO BLESS FUTURE GENERATIONS.

Please consider including the church in your will with a simple statement like this:

I give and bequeath the sum of \$_____ (or the % of) to be used for the general program of (Name of Church), in (City, State), USA.

Please consider making a gift that lets you live forward by giving forward.

A will is unique and must be structured to fit the needs and estate plans of each individual in accordance with the laws of the state in which they live. For this reason, you should consult a lawyer to assist you in drafting your will and estate plan.

Your Presbyterian Foundation Ministry Relations Officer (MRO) can guide you through this important giving process.

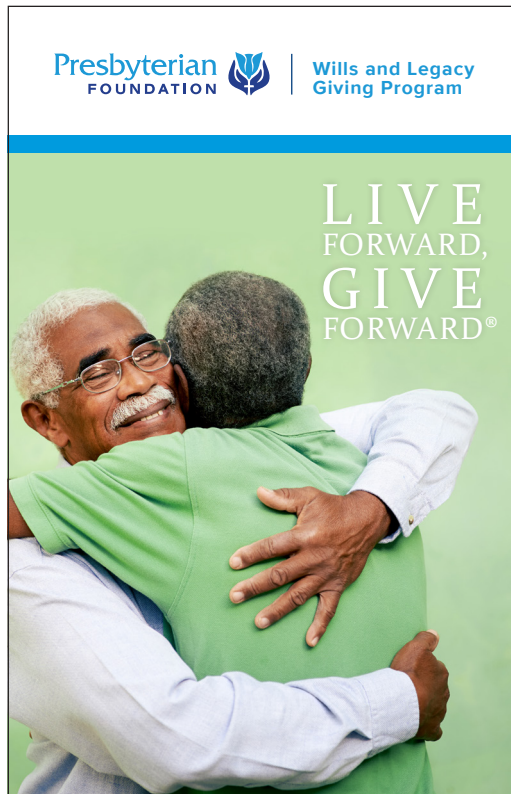
Find an MRO at PresbyterianFoundation.org

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Poster A



Poster B



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