

## Recognition Society for Planned Giving

**What:** A group of people who have made plans for a future gift to the church in their estate plans or other type of planned gift such as the beneficiary of a life insurance or IRA account, charitable gift annuity, charitable trust, etc. The group is recognized by the church.

**Why:** To allow for thanking these individuals during their lifetime for the enduring gifts for the mission of the church. This also sets an example for others to follow.

**Who:** Membership is for anyone who indicates they have made planned gifts (includes bequests) for the church. There is no need to provide proof of the future gift.

**Naming the Society:** Select a name that has special meaning for your church, such as the “1900 Society” to commemorate when your church was founded.

### Initial Introduction

- Approach church leadership to join. It is ideal to have 100% participation.
- Run a series of articles in the church newsletter inviting other to join. Always state the case for support – what will these types of gifts allow the church to do?
- Send personalized letter inviting other to join. You may wish to select a certain group, maybe based on volunteer involvement, specific age, years that they have been a member.
- May want members who join in the first year to be “charter members” of the society.

### Ongoing Promotion

- Incorporate society information into planned giving brochures.
- Run regular articles in the newsletter featuring what the church is doing and how it is fulfilling the mission. Also include profiles highlighting society members (with permission), why they have made a gift and the satisfaction the gift brings.
- Annual invitation to join society.

### Annual Recognition

- Host a thank-you dinner where you may have a short program and/or entertainment.
- Put a notice in the church bulletin regarding the event.
- Publish a current list of members in the program, if they have given permission. Some members may wish church leaders to know of their future gift but wish to remain anonymous during their lifetime.
- Recognize new members to the society and give them a small token such as a desk plaque or paperweight. A lapel pin with a significant emblem from your church works nicely as a visible symbol others can see.