

A Dozen Ways to Promote Planned Giving in Your Congregation

1. Meet face to face with individuals who could make a gift. Talk about why your fellowship, congregation, or society matters. Ask them if they would like to “leave a legacy” for Unitarian Universalism.
2. Publish announcements in the newsletter. Run an ad reminding church members to “Remember your congregation in Your Will.” Ask an artistic member to draw up a nice ad with calligraphy or a cartoon.
3. Schedule brief testimonials for Sunday Service. Someone who has included the congregation in their Will could tell others why they did it. A member of the planned giving committee could remind people who to contact if they want to explore ways to make a gift to the endowment.
4. Publicly recognize bequest donors. Some people prefer to remain anonymous, but many are more than willing to be interviewed for a newsletter article, or for a brief posting on a bulletin board. Thank them during a church gathering.
5. Create a bulletin board display with information about church mission and finances. Use bright colors and bold, catchy headings. Create an atmosphere of generosity and build awareness regarding the congregation's fiscal well-being.
6. Create some informal posters about each planned giving vehicle and rotate their display at the church. Include a contact person (with phone number to call) for those people wanting more information.
7. Work with the religious educators in your congregation to see if there are any intergenerational opportunities. A series on giving and stewardship could have young people interviewing the founders of the congregation and sharing what they learn with the whole congregation.
8. Compile a list of trusted professionals to share with members who need to find help with personal accounting and investing, to review their estate plans or write a new Will.
9. Keep your professional staff and lay leaders informed about your planned giving program. Let them know how many people have arranged a charitable bequest, or a gift annuity, or whatever. Ask the president/chair of the Board to thank people for this support.



10. Survey your members to find out what questions and concerns they have regarding their personal financial planning. Many may want more information on pension distributions, assigning benefits, 401(k) rules, providing for heirs, value-based philanthropy. Many may want information on preparing health care proxies, evaluating long-term care insurance, and the like. Use the responses to plan a series of events that will address their concerns.

11. Gather people together for special events. Someone who already has arranged a gift to the congregation in their Will might be willing to invite others to dinner at their home and use the occasion to encourage these guests to be generous too.

12. Visit the website of the Unitarian Universalist Association:
www.uua.org/giving/planned Learn what is available for planned gifts.

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