

A Dozen Ways to Promote Legacy 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 your newsletter. Run an ad reminding members and friends to “Remember our Congregation in Your Will.” Ask an artistic member to draw up an ad using 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 legacy giving committee could remind people whom to contact if they want to explore ways to make a legacy gift.
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 gathering.
5. Create a bulletin board display with information about your congregation’s 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 informational posters about each planned giving vehicle and rotate their display. Include a contact person and their information for those people who would like more information. (Please note: contact the UUA before creating posters about Charitable Gift Annuities.)
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. Add information to your website about opportunities for legacy giving and/or your Legacy Society, including information about types of gifts and the name of the person to contact at your congregation.



9. Keep your professional staff and lay leaders informed about your legacy giving program. Let them know how many people have arranged a charitable bequest, or a gift annuity, or other type of legacy gift. 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 financial and/or end of life planning. Some may want more information on pension distributions, assigning benefits, 401(k) rules, providing for heirs, value-based philanthropy. Some 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 legacy gift to the congregation 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 Office of Legacy Gifts' website - www.uualegacy.org - to learn what is available.

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