

Seminar Content

The seminar will focus on key aspects of legacy planning including:

- The importance of a legacy plan that reflects your love of family, church and other friends.
- Important documents, beyond a will, to ensure your wishes are honored.
- The financial and emotional burdens that result from a failure to plan.
- Giving options and techniques that allow parents to consider the unique needs of their children.
- Tax-efficient ways to maximize the assets available from one's estate.
- Opportunities to help provide financial security during retirement years.

Seminars mix informative presentation with active discussion. Questions by participants are encouraged! Seminars are designed to inform and educate; no products are sold. Participants will be encouraged to consider, however, how they might remember the importance of the your congregation as they consider their legacy.



CHRISTIAN
CHURCH
FOUNDATION

Helping Disciples Make a Difference

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A Guide to

Preparing for a Planned Giving Seminar



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An Introduction

Introducing members of your congregation to concepts of legacy planning, planned giving and the Christian stewardship of accumulated resources can provide a growing future stream of income to support the mission and ministry of your congregation. Best of all, you don't have to do it alone — the Christian Church Foundation is here to provide guidance and support at no cost. Typically the largest gift individuals can make to the congregation is at death by remembering the church in their Last Will & Testament or other estate plan. This allows individuals to leave a legacy that can support ministry and serve as an inspirational witness to others.

A key step is educating people and inviting them to consider gift planning. A free, no-obligation seminar presented by the Foundation staff is one of the easiest ways.

Getting Started

Congregations with the most successful planned giving ministries start by collecting a handful of trusted and respected church members who have a deep love of the church and would consider a gift in their own plans. These key leaders lay the groundwork for a successful seminar by working with the church to develop a sound endowment fund policy that can inspire legacy gifts and put in place procedures to appropriately govern the endowment. Foundation staff are available to help congregations with policy development and mentoring.

When the policy is in place, your Foundation

representative can work with congregational leaders to encourage planned gifts by conducting a planned giving seminar and meeting privately with individuals in discussing their legacy plans.

Foundation staff members provide the necessary resources to promote the seminar, including worship bulletin inserts, posters and sample letters from church leaders to prospective attendees. Church leaders should invite everyone, since legacy planning is vital regardless of age, marital status or family situation.

Oftentimes, a seminar will be preceded by a fellowship dinner. Time for refreshments provides a wonderful opportunity for fellowship and followup conversations.

If the seminar is scheduled for a Sunday after worship, the Foundation representative may be scheduled to preach during the service — providing an additional opportunity to help set the stage for the seminar.

The seminar will typically last 60 minutes with significant time for questions and answers. Meeting materials are provided at no cost to the congregation.

You can contact your Foundation representative by calling the Foundation toll-free at (800) 668-8016. Simply be prepared to give the name of your congregation and location.