

Starting a Successful

Legacy Ministry

In Your Congregation



CHRISTIAN
CHURCH
FOUNDATION

Helping Disciples Make a Difference

Why a Legacy Ministry?

A legacy ministry is a vital tool in helping congregations create a culture in which faithful members consistently bless the congregation with gifts that reflect their love of their church family.

Members who love the church can extend their giving beyond their lifetime by including the church in their legacy gift planning. Focusing on this ministry builds a sense of excitement and hope in the church as the congregation and its members consider the future of the church through teaching, inviting, and mentoring a spirit of generosity in the life of the congregation. As people consider the legacy they want to leave, they dream and hope about the future and consider what needs to be done to accomplish those dreams and hopes.

Many churches opt to establish a Legacy Society as a key part of their legacy ministry. A church's Legacy Society has two primary goals:

- To thank donors for their desire to include a gift to the church in their legacy plans
- To encourage other church members to do likewise.

What Qualifies as a Legacy Gift?

A legacy gift is any major gift made during a lifetime or at death as part of a donor's overall financial or estate planning. Legacy giving is a method of supporting charitable causes that enables donors to make larger gifts than they could make from their income. While some legacy gifts provide a lifelong income to the donor, others use estate and tax planning techniques to maximize the gift or minimize its tax implications on the donor's estate.

Suggested Guidelines

Congregations can set whatever membership guidelines they desire for a Legacy Society. Often, persons can be members if they have:

- Signed trust documents, wills, life insurance, or other agreements that designate a future gift to the congregation, and/or
- Named the congregation as a beneficiary of a life-income gift agreement, such as a charitable gift annuity or charitable remainder trust, and/or
- Contributed during their lifetime in a significant way.

The donor should complete a form that indicates their willingness to be a member of the Legacy Society, grants permission to be listed as a member, and identifies how the donor's name should be listed when recognizing the gift or intended gift.

Successful Strategies

Through experience, the Foundation has identified key attributes to a successful legacy ministry.

- The pastor must be a visible, vocal advocate, and mentor others. Being a faithful advocate includes putting their own legacy plans in place that include the church.
- Create a team of trusted church members who can provide leadership for at least three years, and are willing to put their own personal plans in place so that they may offer testimony to their belief in the ongoing witness of the church.

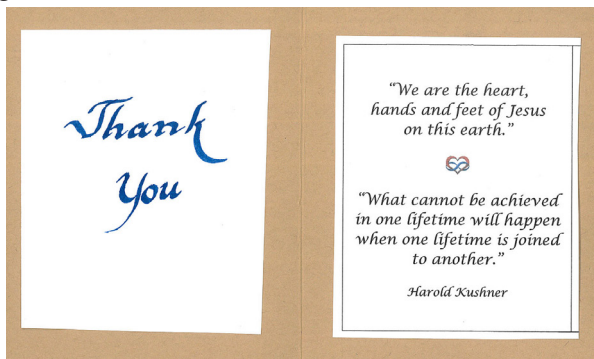
Successful Strategies cont'd.

- Implement and approve a permanent fund policy that communicates how end-of-life and other legacy gifts will be managed and the income distributed for ministry. The Foundation can provide free consultation services and a successful model policy.
- Start a Legacy Society that includes those who have put plans in place for a legacy gift to the congregation.
- Host educational workshops, provided free of charge by the Foundation, to help church members understand the need to create a legacy plan, the ways gifts can be made, and God's call on their lives to be faithful stewards.
- Use existing church communication, including the newsletter, bulletin, and social media to lift up the importance of legacy giving as part of individuals' stewardship.
- Interpret your planned gifts policy in a reader-friendly way that will encourage prospective donors to make legacy gifts.
- Create a simple brochure that discusses how planned gifts will enhance the future ministry of the church. The Foundation can provide samples of brochures from other congregations.
- Be open and transparent about how legacy gifts are used.
- Establish a timeline that includes promotion of legacy giving, scheduling inheritance planning workshops, recognizing saints and legacy donors as part of worship, and reporting on how the church's witness is enhanced by endowment funds.

Give Thanks

Legacy Society recognition is an excellent way to express appreciation to those who have gift plans in place and to encourage others to make legacy gifts. This recognition can take many forms, including:

- Celebrating gifts in the context of worship when they arrive.
- An annual event or dinner where Legacy Society members are invited and formally thanked for their gifts and gift plans.
- A wall plaque or other visual reminder which can be placed in a prominent location. This type of recognition is also a good way to honor and remember those whose gifts have already been received.
- An annual listing of members' names that is distributed to the congregation. This can be incorporated into a report to the congregation about the church's endowment fund, shared with the congregation on All Saints Day, or lifted up as a recognition of gifts at Epiphany. This listing can encourage new gifts and help families and friends in knowing their loved ones are not forgotten.



Sample Thank You note from Cherry Log Christian Church
Legacy Partners Foundation

Mentoring Matters

Some donors, not wanting to draw attention to themselves, may be reluctant to be recognized for their intended gifts. When they understand that their witness can encourage other members to consider how they might leave a legacy, they may agree to be recognized through events and publications.

A legacy ministry is more than raising money for the church's future needs. It allows church members to provide their own ongoing legacy to support the ministries and witness of Jesus Christ.

Want More Information?

Foundation development staff are trained to help churches develop a legacy ministry and to create the processes that will make congregations faithful stewards of donors' end-of-life gifts.

Contact the Foundation for church-specific counsel about promoting legacy gifts. Call (800) 668-8016 or send an e-mail to info@ccf.disciples.org.

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