

HOW TO CREATE AND GROW A LEGACY SOCIETY

The Rev. Charles Cloughen, Jr.

Planned Giving Consultant
Diocese of Maryland

Diocesan office: 410-467-1399

Home office: 443-388-3768

PLANNED GIVING INTRODUCTION

A well-rounded stewardship program in any parish not only engages parishioners to support their parish's needs on a day to day basis through the giving of gifts, time and resources, but it also encourages them to plan for the long-term sustainability and stewardship of their beloved church. We all, eventually, return to God. Through estate-planning and planned giving, we can ensure that the ministries we love outlast our time on earth.

WHAT IS A LEGACY SOCIETY?

Legacy societies are a cornerstone of planned giving stewardship. As with any stewardship campaign, giving donors recognition for their generosity is important for fostering connections and strengthening the bond between your donors and your church. Showing gratitude to your legacy donors shouldn't stop as soon as the will/estate plans are written, nor should it wait until after they pass away to begin. By establishing a legacy society, you give legacy donors a way to stay connected to their gift and feel rewarded for their contribution, while also promoting participation to your parish as a whole.

CREATION OF A LEGACY SOCIETY

1. Secure a commitment from the Rector or Vicar to read aloud the instruction on page 445 of the Book of Common Prayer following the Thanksgiving of a Child multiple times a year and comment on it.

"The minister of the Congregation is directed to instruct the people, from time to time, about the duty of Christian parents to make prudent provision for the well-being of their families, and of all persons to make wills, while they are in health, arranging for the disposal of their temporal goods, not neglecting, if they are able, to leave bequests for religious and charitable uses."

It is found in the Thanksgiving for a Child because having a will is responsible parenthood. This can be read during liturgically relevant days, All Saints Day, 4th Sunday of Lent, on whatever day your parish celebrates its Legacy Society, etc.

2. Add the following language to your church's pledge cards if it is not already there, **[see Appendix A example]:**
(Check off)
 I have remembered [parish name] in my will/estate plan

 Please send me information about including [parish name] in my will/estate plans
3. Have your treasurer or planned giving officer compile and maintain a list of individuals and households who have remembered your parish in their wills or estate plans.
4. Draft an endowment fund brochure. See “Funding Future Ministry: A Guide to Planned Giving” from the Episcopal Church Foundation.
 - a. Have the vestry be presented with a design and plan of action or have them develop one on their own.
 - b. Attached is an example of a Legacy Society brochure with mission statement, information on how to give and language for drafting bequests. **[Appendix B]**
5. From your list of members who have remembered the parish in their will/estate (refer to pledge card responses), select a handful of committed individuals and establish a small committee with a Chair and Co-chair to found the Legacy Society.
6. Have the committee draft an invitation to send to the remaining individual households on this list and invite them to become founding members of your legacy society. **[Appendix C]**
7. When sending out invitations, be sure to also include an enrollment form in your letter that includes an opt-out of being publicly named (in case a donor wishes to remain anonymous) **[Appendix D]**.
8. After receiving your responses from legacy donors, draft a list of official members to be put into your Annual Report and share that through the parish newsletter along with an invitation for new members to join the society **[Appendix E]**.
9. Prepare a plaque with the names of the members of the Legacy Society and put it in a prominent place. Make sure it has the capacity to add names. Some popular plaque designs include trees with member names on leaves or branches.
10. Every year at your Annual Meeting, be sure to share the names of the Legacy Society members as acknowledgement and thanks.

11. Arrange a special event to thank your legacy society members: a nice reception, afternoon tea, a special cake at hospitality hour. An added benefit would be to coordinate this “thank you” with a diocesan event. For example, the Diocese of Maryland hosts an annual fall recognition event for all members of all parish-level and diocesan legacy societies. Members of your legacy society are invited to participate, but we still strongly insist that parishes host their own recognition event as well. That donor-parish relationship needs upkeep!
12. Publicize when the church receives a bequest from members of the Legacy Society.
13. Speak about the Legacy Society when appropriate, i.e., leading up to and in the aftermath of your annual reception, while discussing planned giving as a whole, etc.
14. Repeat the program year after year. Every year invite additional members of your congregation to remember their parish in their estate plans and join the legacy society.

Resources available from the Episcopal Church Foundation and can be ordered from Forward Movement at forwardmovement.org or 800-543-1813.

- PLANNED GIVING ON DEMAND, a collection of planned giving resources to empower your congregations mission and ministry, including FUNDING FUTURE MINISTRY by the Episcopal Church Foundation - \$35
- “FUNDING FUTURE MINISTRY: Guide to Future Ministry” by the Episcopal Church Foundation - \$15
- “Planning for the End of Life: Faithful Stewards of God’s Gifts” - 5 booklets: \$15
- “Writing you Will: Where there is a Will There is a Way” - 10 Pamphlets: \$4.25

St. Thomas' Church
Homestead

Towson, Maryland

*In Thanksgiving For All The Gifts
God Has Given To Me And My Family,
This Pledge Is Made For The Future Growth Of*

St. Thomas' Church Pledge

Weekly	Monthly	Annually
\$_____	\$_____	\$_____

Name _____

Address _____

_____ I have remembered St. Thomas in my Will/Estate

_____ Please send me information concerning Wills/Estate Plans



St. Thomas' Church
Homestead

Outreach and Heritage Funds

1108 Providence Road
Towson, Maryland 21286

ST. THOMAS' CHURCH

OUTREACH AND HERITAGE FUNDS

The purpose of these Funds is two-fold:

1. The Outreach Fund - Income from this Fund is to be used for the relief and assistance of members of St. Thomas' Church or to be distributed as charitable grants to charitable organizations to further God's work in the community.
2. The Heritage Fund - The purpose of this Fund is to provide a source of income to be used to preserve, renew, replace and develop the heritage of properties of the church so that the church continues to be a fitting place of worship and to fulfill its mission.

Gifts may be made as memorials. The names of those in whose memory gifts are made will be inscribed in the Book of Remembrance and their families will be notified of the gift. Formal acknowledgements will be sent to families and donors.

Memorials may be substantial or they may be small; for example, a donation could be sent to the fund instead of flowers to a funeral.

Gifts may be made in thanksgiving, for anniversaries, and in remembrance.

Gifts may be in the form of cash, stocks or bonds, If equities which have appreciated in value are given, the donor may not be required to pay a capital gains tax, and may use the current market value of the stock as an income tax deduction.

Gifts may also be articles of value, such as silver or paintings, or a house, or land; in short, almost anything a donor wishes to give. These gifts are tax deductible to the limit allowed by law. It should be understood, however, that it is within the discretion of the Vestry to sell all gifts and deposit the proceeds in the designated Fund.

The Parish will also welcome bequests. Indeed it is hoped that many parishioners will provide (in their wills) for contributions of these Funds.

There are many ways to make bequests. For instance, a person could give a large sum to the Fund, receive the income therefrom during his/her life, and at death the estate would pay no inheritance tax on the bequest to the Church.

A standard form of bequest will be found on the back page of this leaflet. If interested, parishioners are advised to discuss this matter with their attorney, who can suggest to them the most advantageous way to make a bequest to St. Thomas'.

These Outreach and Heritage Funds correspond to the endowment funds which many churches are developing.

If anyone wishes to establish a trust fund for a designated purpose, please consult the Rector.

Any questions regarding the Outreach and Heritage Funds will be gladly answered by the Rector and by members of the Vestry. The By-laws of both the Outreach and Heritage Funds are on file in the Parish Office.

* * * * *

FORM OF BEQUEST

THE OUTREACH FUND

I give, devise and bequeath to St. Thomas' Church - Homestead, 1108 Providence Road, Towson, Maryland, the sum of _____ or _____ % of the residue of my estate or property, for the St. Thomas' Church Outreach Fund.

THE HERITAGE FUND

I give, devise and bequeath to St. Thomas' Church - Homestead, 1108 Providence Road, Towson, Maryland, the sum of _____ or _____ % of the residue of my estate or property, for the St. Thomas' Church Heritage Fund.

ST. THOMAS' ALL SAINTS LEGACY SOCIETY

January 6, 2007

Dear Nancy,

We are writing to ask you to join with us in becoming founding member of the St. Thomas' All Saints Legacy Society. This Society has been created to commend and graciously thank those who have remembered St. Thomas' in their Last Will and Testament/ Estate.

You indicated on your Pledge Card that you have remembered St. Thomas' in your will/estate. Your witness to your stewardship will provide for the future life and ministry of St. Thomas'. Your witness will encourage others to leave a legacy. We want to recognize your commitment and invite others to join with us in remembering St. Thomas' in their Estate plans.

We have named this the "St. Thomas' All Saints Legacy Society" in honor of all those who make up the Communion of Saints. In New Testament times "saints" were referred to all the members of the Christian Church who most dearly witnessed to Christ. These "friends of God" were heroic examples to all the saints of the meaning of the Christian faith, hope and love. With these noble examples in mind, those members of the All Saints Legacy Society offer their gifts to build up our church so that future generations might know and "share the Body of Christ."

We plan to write to our entire Parish and invite them to join us a Member of the All Saint Legacy Society and share with them the names to those who have joined.

Please fill in the enclosed form and return it by January 22, so that your name may be listed in the invitation to the entire parish.

Again, we thank you for including St. Thomas' in your estate plans.

Peace, Love and Joy,

The Rev. Charles Cloughen

Marie R, Chair

Robert C., Co-Chair

William D, Co-Chair

St. Thomas' All Saints Legacy society

Enrollment Form

The St. Thomas' All Saints Legacy Society honors individuals who make an investment: in our future ministry by including St. Thomas' in their estate plans or through lifetime gifts.

I (we) accept the invitation to join fellow supporters of St. Thomas' in becoming (a) member(s) of the St. Thomas' All Saints Legacy Society.

Name(s): _____

Address: _____

Phone: _____

Email: _____

On the roll of the All Saints Legacy Society I (we) wish my (our) name(s) to appear as:

Signed: _____

Date: _____

I (We) consent for my (our) name(s) to appear with others on the public roster of the Society.

I (We) don't wish for my (our) name(s) to appear with others on the public roster of the Society.

Confidential

I (We) have included St. Thomas in my (our) estate plan.

Please return this form to St. Thomas' Episcopal Church, 1108 Providence Road, Towson, MD 21286 in an envelope marked "Confidential" by May 21st, 2007.

Thank you very much. Your gift will be a blessing to many.

SAINT THOMAS' ALL SAINTS LEGACY SOCEITY - JUNE 14, 2007

1 Anonymous
Mr. and Mrs. J C
The Rev. and Mrs. C C
Mr. and Mrs. W D
Mr. and Mrs. C F
Mrs. L F
Mr. * and Mrs. F G
Mr. and Mrs. P H
Mr. and Mrs.* E H
Mr. and Mrs. J H
Miss C J
Mr. and Mrs. D J
Mr. S K
Mr. and Mrs. J L
Mr* and Mrs. W M
Mrs. M N
The Rev. G N
Ms. M R
Mr. G C R
Mr. and Mrs. J R
Mr. and Mrs. C S
Mrs. J S
Mr. and Mrs. J S
Mr. and Mrs. A S
Mrs. E T
Mr. and Mrs.* T W
Mr. and Mrs. H W
Miss H Z

* Denoted Deceased

29 Member Households