



Promoting Your ENDOWMENT

"A Three-Year Plan For Promoting Your Church's Planned Giving Emphasis"

YEAR ONE:

Two educational presentations to Administrative Board/Council **during the year**

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| Mailings: | February | Endowment Program promotional brochure |
| | May | Wills series brochures |
| | August | General planned giving brochures |

Quarterly articles in church newsletter

One-liners in bulletin once **each month**

Estate and Gift Planning Workshop (basics of estate planning and charitable gift planning)
at best time for the local church

Memorial Observance or Service of Remembrance **on appropriate occasion**

Target Group Presentations (i.e. UMW, UMM, Senior Adults) **as often as possible**

YEAR TWO:

Quarterly educational presentation to Administrative Board/Council

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|-----------|-----------------|--------------------------|
| Mailings: | February | Wills series brochure |
| | May | Estate planning brochure |
| | August | Wills series brochure |
| | November | Life insurance brochure |

Monthly articles in church newsletter

One-liners in bulletin **twice each month**

An Estate Planning Seminar (more intensive estate planning) **at best time**

Memorial Observance or Service of Remembrance **on appropriate occasion**

Target Group Presentations (i.e. UMW, UMM, Senior Adults) **as often as possible**

YEAR THREE:

Quarterly educational presentations to Administrative Board/Council

| | | |
|-----------|-----------------|--------------------------|
| Mailings: | January | Wills series brochure |
| | March | Living trusts brochure |
| | May | Wills series brochure |
| | August | Planned giving brochure |
| | November | Year end giving brochure |

Monthly articles in church newsletter

One-liners in bulletin **twice each month**

A Charitable Gift Planning Workshop **at best time for local church**

Memorial Observance or Service of Remembrance **on appropriate occasion**

Target Group Presentations (i.e. UMW, UMM, Senior Adults) **as often as possible**