

TEMPLATE: Letter introducing planned giving program

For suggestions on how to use this type of letter in your planned giving program, see *Funding Future Ministry Chapter VI Educating Your Congregation*.

SECTION 1: INTRODUCTION: CAPTURE INTEREST WITH PERSONAL QUOTES AND EXAMPLES FROM YOUR PARISH

"St. Swithin's has been the spiritual center of our lives for years. We want to make a gift that will help the parish continue its mission and benefit generations to come. But it sounds complicated! Where do we start?"

Use a quote from one of your parishioners if you can.

Dear _____,

Personalize using mail merge.

Perhaps you have had similar thoughts. Throughout your lifetime, you've given faithfully to the ministry of St. Swithin's. You have committed your annual pledge and participated in capital campaigns that met specific needs, such as the new parish center. Perhaps you've made a memorial gift to honor a loved one.

Use a specific example from your parish, if applicable.

Each gift is an expression of your values, priorities and gratitude for God's blessings in your life. By giving, we worship God and strengthen our community, as every gift blesses others.

SECTION 2: EXPLAIN BASICS ABOUT PLANNED GIVING

Through the ministry of planned giving, we have a powerful opportunity to ensure that our most sacred values and commitments are part of the legacy we leave behind for future generations. Since planned gifts generally come from the accumulated assets of our lifetime, it is an opportunity to make a final statement of support for a ministry dear to our hearts.

St. Swithin's planned giving program benefits both our present and future members. Through planned giving, we can help parishioners provide for the needs of their family through effective estate planning and tax reduction strategies. Planned gifts also ensure that the church will have the resources needed to continue its mission and ministry for many years to come.

Planned giving does not have to be complicated—and it is not only reserved for those with great wealth. It can be as simple as adding a bequest to the church in your will. Other options, such as charitable gift annuities through the Episcopal Church Foundation, provide a guaranteed income for life and substantial tax savings.

SECTION 3: PROPOSE NEXT STEPS/PROVIDE CONTACT INFORMATION TO FOLLOW UP

Please take a moment to read the enclosed brochure, *The Ministry of Gift Planning*, which explains the most common types of planned gifts and their benefits. You may also want to visit the Episcopal Church Foundation website (www.EpiscopalFoundation.org) to learn more.

We ask you to prayerfully consider taking the next step—exploring planned giving opportunities to support St. Swithin's. Members of the planned giving committee stand ready to provide more information or meet with you for a confidential discussion about planned giving options to best suit your particular circumstances.

You may need to adjust this if there is no committee. "Please contact the rector, senior warden..."

Please return the response card in the brochure to the church office, or call to set up an appointment.

Faithfully yours,
Chair of Planned Giving Committee