

LEGACY GIVING

Checklist



So now you are ready to get your legacy giving under way - so you need to get your foundations right

- ✓ Share your vision – inspire people to want to include your parish in their wills by talking about what your parish is doing to share its mission and develop it's ministry.
- ✓ Make time to discuss this at PCC – have you got your PCC Legacy toolkit – you can order one here if you don't (<https://www.churchprinthub.org/product.aspx?prod=SL1014PK&cat=4>)
- ✓ Build trust – talk about how you use gifts – either now or in the past, be open with your policies so people know that they can trust you to honour their wishes
- ✓ Here is the perfect time to get your legacy policy in order – you can use this as a template (<https://www.parishresources.org.uk/legacies/developing-a-legacy-policy/>) or get in touch with the Generous Giving Team for support
- ✓ Demonstrate impact – great if you have your own, or share from other parishes so people can see the actual, real life impact of making a gift
- ✓ Frequent messaging (normalise it) – this is a group effort – talk about generosity and giving in all forms, but do make mention and refer to legacy giving in sermons, in PCC's, in days of thanksgiving.
- ✓ Make sure you always have information available – you never know what that interest may turn into action – head over to the Print hub (<https://www.churchprinthub.org/default.aspx?q=legacies&cat=4>) and you can order book marks, leaflets, posters, information booklets – these can even be personalised. Remember – drip, drip, drip
- ✓ Celebrate generosity and thank appropriately – legacies are usually a very meaningful and so celebrating these will continue to honour the person who has decided to make the gift. Whatever the legacy was used for – find a way to mark with thanks – maybe it is a picture, a plate, a plaque, a memorial book.

**Need some help contact Leanne or Joanne :
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