# Gift Planning for Churches

## Sample Two-Year Plan

"There is a time for everything, and a season for every activity under the heavens."
– Ecclesiastes 3:1

## Year 1

- Develop policies
- Ministry needs identification & formation

- Article in newsletter announcing gift planning emphasis
- Congregational/constituent introduction: moment during worship/lunch/dinner
- Brochure design for ministries in-focus

- Estate planning seminar
- Links from website
- Customized brochure distribution
- Bequest language information in newsletter
- Wills brochure information in newsletter

- Gift annuity brochure over 70 mailing
- Donor Advised Fund brochure under 70 mailing

## Year 2

- During worship or a larger event: story of past bequest and how it benefited the church/organization
- Article in newsletter on a past planned gift

- Preliminary assessment of gift planning efforts
- Article in the newsletter for further promotion

- Asset based gifts – how to give stuff
- Article in the newsletter on non-cash gifts

- Article in newsletter on year-end giving

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Moving ministries forward, *together.*