

*But just as you excel in
everything – in faith,
in speech, in knowledge,
in complete earnestness
and in your love for us
– see that you also excel
in this grace of giving.*

2 Cor 8:7-9

TABLE OF CONTENTS

This guide is designed to assist your parish’s advancement of planned giving. Contents are also posted at www.dor.org/sd and can be customized as needed.

The Stewardship Connection.....	1
What is Planned Giving?.....	2
Planned Gifts – Types & Benefits.....	3
Examples of People Who Made Gifts.....	4
The Case for Planned Giving	5
Organizing Your Parish Effort	6
Concerns/Objections	7
Planned Giving Benefits Parishes.....	8
A Pastor’s Perspective	9
Estate Planning Questions & Answers	10
How to Word a Bequest.....	11
Planned Giving Messages	12
Advertising Sample #1	13
Advertising Sample #2	14
Sample Letter #1	15
Sample Letter #2	16
Stewardship & Communications Office	17

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The Stewardship Connection



In their pastoral letter, *Stewardship: A Disciple's Response*, the U.S. Catholic Bishops remind us that good disciples and stewards do the following:

“As Christian stewards, we receive God’s gifts gratefully, cultivate them responsibly, share them lovingly in justice with others, and return them with increase to the Lord.”

Each generation of Catholics is given an important mission: how do we pass on the faith to the next generation? Foremost is evangelization — knowing our faith well and sharing it with others. As important, is the careful and prayerful sharing of our God-given resources. One of those resources — our assets — includes the things we have accumulated over our lifetime.

As Catholic Christians, we believe that our assets and our ability to acquire them are gifts from a loving, generous God. We have a responsibility to use these gifts wisely and prudently — as well as to share them with others — our family certainly, but also with those institutions devoted to spreading God’s reign on earth.

Bequests in wills, charitable gift annuities, trusts, insurance and gifts of appreciated stock are all planned gifts, or gifts that come after much thought and consultation with professional advisors. These important gifts will ensure that our lives will touch the lives that come after us and building the faith for generations to come.

For more information on parish stewardship please visit www.dor.org/sd.

What is Planned Giving?

What is a “planned gift”?

It is a gift given to a charity through a will, contract or trust. Planned Giving is charitable giving that is planned, often deferred, and usually spread out over an extended period of time.

Types and terminology

Popular examples include bequests of money, stocks, or tangible possessions; as well as life insurance policies and Charitable Gift Annuities. Additionally, there are the more complex trust entities – charitable remainder trusts and lead trusts.

- **Will** - legal document stating the disposition of a person’s property upon his/her death.
- **Bequest** - specific gift of property or assets included in a will.
- **Life Benefit** - proceeds from a life insurance policy’s face value payable to the beneficiary.
- **Gift Annuity** - Contract by which a donor transfers cash or property in exchange for income payments for life.
- **Life Estate** - donor gives home or land and retains rights to occupy or benefit from the property for life.



- **Charitable Remainder Trust** - a trust which returns income, fixed or variable, to the donor or others for life, or a period not to exceed 20 years.
- **Charitable Lead Trust** – a trust whereby the donor transfers assets/funds to a trust which, in turn, pays the charity for a certain period of time.

TENETS OF PLANNED GIVING

1. **Planned giving is realized primarily through relationships, not the vehicles of giving.**
2. **Planned giving is the means to an end: focusing on the end facilitates the means.**
3. **There isn’t always a direct relationship between wealth and charity.**

Planned Gifts - Types & Benefits

TYPE OF GIFT	BENEFIT TO PARISH	BENEFIT TO DONOR
Bequest in a Will	Bequest could be held in perpetuity and invested to fund special needs.	<ul style="list-style-type: none"> • Possible estate-tax deduction. • Perpetual-gift opportunity.
Charitable Gift Annuity	Assets that are not used in paying annuity to the donors or others benefit the parish.	<ul style="list-style-type: none"> • Guaranteed fixed income for life. • Portion of income is tax free. • Deferred tax deductions.
Insurance Policy	The parish receives full face value of policy upon death of the donor, or may receive certain surrender value prior to donor's death.	<ul style="list-style-type: none"> • Income-tax deduction for value for the policy when transferred. • Premium payments may be deducted as gifts. • Possible income-tax and estate-tax deductions.
Charitable Remainder Trust	Upon the death of the donor or last surviving income beneficiary, the remaining assets benefit the parish.	<ul style="list-style-type: none"> • Variable or fixed income. • Deferred income if desired. • Possible income-tax and estate-tax deductions.
Charitable Lead Trust	Income for duration of trust helps meet needs that exceed the capabilities of most parishes, schools, agencies or ministries.	<ul style="list-style-type: none"> • At end of trust period, principal returns to donor or other beneficiaries. • Principal can pass to others with little or no shrinkage. • Possible income-tax and estate-tax deductions.
Retirement/IRA	Significant gift upon the death of the donor benefits the parish.	<ul style="list-style-type: none"> • Estate-tax and income-tax savings for substantial portion of gift.
Appreciated Stock	Shares will be sold; the full value of the assets will fund parish needs.	<ul style="list-style-type: none"> • Avoidance of capital-gain tax. • Income-tax deduction for full market value on date of gift.

Examples of Planned Gifts

A Parish Bequest

A widowed parishioner would like to make a gift to her parish. She and her late husband were married in the parish and both their children were baptized and confirmed there. Sunday Mass and parish activities have been important to the whole family for many years. In addition, the pastor was very comforting to her when her husband died suddenly.

At the same time, she is concerned that she might need the money she has as she grows older. While she lives comfortably right now, she feels that it would be prudent to conserve her money. She wonders if her money would last if she had medical needs or wanted to help with the education of her grandchildren or needed a significant repair on her house.

A bequest would be a perfect way for her to make a gift to her parish. She left a specific amount of money to her parish in her will. If she did need the money for anything, she would have it and the bequest would only be paid if there were money left in her estate.

She is happy that she has made a gift and feels certain that there will be money there for the parish.

A Gift Annuity

A retired couple, both are 75 year old, is concerned that their investments don't pay enough income to sustain their lifestyle. As a result they cannot be as



generous to the parish Offertory as they would like. The parish has been a source of life for them over the years and they would like to provide something for the parish when they die.

With a gift of \$20,000 in exchange for a charitable gift annuity, they could receive a fixed annual annuity earning 6.3% (as of 2/01/09). They would also be entitled to a charitable income tax deduction in the current year, and on part of the income in future years.

The couple is tickled because their income has increased dramatically, they received a large charitable income tax deduction and they feel good that they are making a generous gift for the benefit of their parish.

What to do if parishioners want to leave money for Masses

From time to time, parishioners will want to leave money in their wills to have Masses celebrated for themselves and loved ones. The law of the Church is very concerned with ensuring that intentions for Masses are taken very seriously and that the Masses are celebrated. The actual language in bequests for Masses has

implications not only for civil law, but also for canon law. It is important to note that while the Masses connected with a bequest will always be celebrated, there are occasions when the parish to which the money for the Masses was donated cannot celebrate the requested Masses so the money will go elsewhere.

The Case for Planned Giving

We are challenged to recognize our God-given gifts of time, talent and treasure. We are also called to be good stewards of these gifts and to share them with others. Planned giving offers the faithful unique opportunities to carry on the Lord's work.

The giving of our treasure that is planned and received by the means of a will, contract, or trust is a growing segment of charitable philanthropy. Our maturing population will continue to drive this trend as part of a significant transfer of wealth in our nation. Ever present is the strong motivation to give based on the spiritual and human need to help others, to leave a legacy, to memorialize a loved one, and very likely to secure tax benefits.

To the point of financial incentives, potentially large charitable deductions may be taken against the two major tax structures affecting this growing segment of Americans – income and capital gains tax, and gift and estate tax. Additionally, the direct advantages of income, gift and estate tax deductions arrived through the diverse range of planned giving vehicles often permit donors to consider even larger charitable gifts than they might have made.



Charitable planned giving provides a wonderful opportunity to show love and spiritual gratitude for your God-given gifts of treasure – the sharing of your blessings in a comprehensive and productive manner.

DEVELOPING A CASE FOR SUPPORT

1. Identify and document the needs of your parish.
2. Identify programs and strategies designed to address the needs.
3. Establish the competence of the organization and its staff.
4. Explain who will benefit from the services made possible.
5. Identify the resources that are required to fund the programs.
6. Explain why the prospect should give.
7. How can the contributor give?
8. Respond to the unasked question in the prospect's mind: What's in it for me?

Organizing Your Parish Effort

1. **Convene a small group** of key leaders (4-6) who have a good understanding of your mission, needs and constituent groups. Where applicable, this group should include the pastor/pastoral administrator and any or all of the following: attorney, accountant, insurance agent, financial planner.

2. **Arrange for a basic presentation** on planned giving to this leadership group. Staff from the Stewardship & Communications Office is available to assist.

3. **Following the presentation**, determine that there is sufficient commitment and interest among the group to move forward.

4. **Develop a “mini-case” for support.** The case should include your vision, compelling needs and plans to address these needs. A balance between rational and emotional messages, it should clearly answer the question: “Why should I generously support this ministry?” (see previous page)

5. **Planning giving concepts** are shared in key parish communication vehicles: homilies, bulletins, newsletters, web sites, year-end contribution statements, annual reports, and even as a “P.S.” on gift acknowledgement letters. Brochures on wills and planned giving are readily available in the pews, on display and/or at the back of the church. Lay testimony, targeted mailings, estate planning seminars and individual solicitation are most effective.

Advanced steps:

6. **The leadership group brainstorms** a confidential list of 15-25 donor prospects, age 60 and over, who are considered to be committed to the parish’s mission.

7. **Members of the group** personally contact the prospects to request visits using a similar message in asking for appointments:



- We’d like to consider a planned giving initiative for (our parish) that could have a profound impact on our future.

- I’m hoping we can get together so that I may personally share some ideas with you. Would you be willing to give me an hour or so of your time?

8. **Conduct personal visits** (one-on-one, or possibly two-on-one):

- Highlight the key points of the case statement and ask for reactions.

- Emphasis charitable bequests as a reflection of personal values and stewardship.

- Ask if he/she would consider including our parish in your will? Why or why not?

- Where appropriate, identify other planned giving options.

9. **Follow-up all visits** with an appropriated thank you letter, and additional information as requested.

Concerns/Objections

It's too complicated for me. This guide was written to take away the complexity. Actually drafting legal documents can of course be very complicated, but you don't have to be involved in that part. Marketing planned giving is quite easy and involves doing what you are doing right now.

My parish is not wealthy enough to consider this. The most important predictor of planned giving success is how much people love the parish and the Church. It's hard to say exactly how wealthy someone is by observing their lifestyle, since many people live quite simply.

I have too many things I'm supposed to do now. How can I do more? Indeed, the role of pastor/pastoral administrator has many demands on your time. Therefore, this guide is designed to allow you to do planned giving with as little or as much of your personal involvement as is appropriate for you.

Won't this hurt my Offertory collection? It ought not to hurt your weekly collection. Planned giving is about a larger time frame than week-to-week and involves very different decisions. People on a fixed income may be relatively generous with assets they need during lifetime.

Why put this much effort into bequest when people can change their minds? People can change their minds, but statistics show they usually don't.

What happens if my parish gets closed? What will happen if someone has left us a bequest and we don't exist? The parishioner could leave funds in his/her will for the benefit of a particular parish, but specify that the funds could go to, for example, a successor parish or a specific ministry if the parish does not exist at the time the will is probated.



Our parishioners are very sophisticated. I'm sure most of them already know about these techniques. It's amazing how sophisticated people often don't know about these techniques. Remember that less than half of people have wills in the first place. In lots of cases, they are grateful to find out that there are ways they can give that help them with their taxes and their relationship with God.

I don't want to confuse or anger people by asking for something additional to what they are already doing. You can choose how understated or how aggressive you want to be in marketing planned giving to avoid any possible "push back." It's important to keep in mind that planned giving is very different from Offertory collections or even capital campaigns. We're asking people to make us part of their family and include us in their wills. We're also offering them some significant tax incentives too, so planned giving doesn't usually confuse or anger people – particularly those who really love their parish and the Church.

Catholic Courier Article

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Planned giving benefits parishes

Last June Sacred Heart Parish in Auburn received a gift of \$10,000 from the estate of a parishioner who'd recently passed away. The parish typically receives such gifts once or twice a year, and they are always greatly appreciated, said Sister Chris Treichel, OSF, the parish's pastoral administrator.

"That was very generous and thoughtful to be remembered in someone's will. Gifts like this are gratefully accepted. They help to continue the ministry of our faith community. In these challenging economic times, a surprise like this is very helpful to our budget," Sister Treichel wrote in her June 21 bulletin column.

Such a gift is just one form of a practice known as "planned giving," explained Mark Clark, associate director of the diocesan Office of Stewardship and Communications. A planned gift is one that is given to a charity through a will, contract or trust, he said, and some popular examples include bequests of money, stocks or tangible possessions. Planned gifts also can include the proceeds from life-insurance policies, gift annuities, charitable trusts and life estates, through which donors give homes or land to charities but retain the rights to reside on the property for the rest of their lives.

Planned giving provides an opportunity for Catholics to live out the concept of stewardship, Clark added.

"We always want to make a connection back to stewardship," he said. "Stewardship is the recognition that all we have is a gift from God."

Since all gifts of time, talent and treasure ultimately come from God, Catholics are called as Christian stewards to cultivate those gifts, share them with others and return them to the Lord. Catholics are not the only ones called to be good stewards of their gifts, however.

"Stewardship ... is a term you're hearing more in secular society, taking care of our world and taking care of our resources," Clark said. Planned giving also is being promoted in secular circles, he noted.

"A lot of times people are being advised by their lawyers, their financial planners, their accountants to plan accordingly in a will, and include those organizations and institutions that mean something to them and they want to see prosper in the future," he said.

One local priest said he would like to see Catholic attorneys encourage their Catholic clients to remember their parishes in their wills. Father John Gagnier, pastor of Holy Name of Jesus and parish administrator of

Our Lady of Mercy, both in Greece, said the Catholic Church seems to be lagging behind other institutions when it comes to promoting planned giving.

"I think we Catholics are not very good about promoting the remembering of parishes in the wills, and I think we need to do more of that," he said. "I think it's important that people plant seeds for the future."

Father Gagnier said he is trying to plant such seeds by providing his parishioners with constant reminders about planned giving. The cover of each weekly bulletin at both parishes features a small blurb encouraging parishioners to bequeath at least 5 percent of their estates to their parishes. He's also mentioned planned giving from the pulpit several times.

Clark said his office is in the process of putting together planned-giving guidelines for parish staff members in the hopes that this will encourage them to talk to parishioners about the opportunity. Sister Treichel said that each year she mails a planned-giving flyer to parishioners along with their contribution summaries. She also informs parishioners when the parish has received a bequest, and tries to keep them abreast of what the funds will be used for.

"Because of the economic situation, sometimes (a bequest) helps to close a budget gap and sometimes we're able to put it away in our portfolio of savings for major repairs," Sister Treichel said. "Last year we spent money renovating bathrooms and putting a new boiler in. Putting money in our savings helps us to have money to spend when we have major projects."

Promoting planned giving "is trying to help people to think of the church as an option for giving, and to remember the church in their wills," she added.

Sister Treichel and Father Gagnier agreed that the thought of leaving money to the church after death doesn't even cross the minds of most parishioners. For some reason, people don't see the church as needing money, they said. Both added that they encourage parishioners to direct to their parishes any memorial donations made in memory of deceased loved ones.

"People are looking for ways to honor that (deceased) person," Sister Treichel said. "We sometimes send flowers or a Mass card, but a donation to the church is another way of honoring that person. It's for the future of our parish."

- By Jennifer Burke/Catholic Courier

A Pastor's Perspective

AS YOU PLAN FOR THE FUTURE... PLEASE CONSIDER A GIFT TO YOUR CHURCH

Stewardship has become an important part of our Catholic conversation in recent years. We have heard that stewardship is a “way of life.” We have been reminded that it is rooted in the Scriptures. Stewardship flows from our gratitude to God for the gifts, with which we have been blessed. We show our gratitude by being generous in our response with our time, talent and treasure.

I speak to you as a grateful steward, who wishes to give back to God as much as I can of my time, talent and treasure. As part of my stewardship of treasure I have gladly made a planned gift to the Church. It represents for me a rewarding way of expressing my gratitude for what the Church has meant to me. The Catholic faith has been the cornerstone of my life. The priesthood ever continues to be a source of joy and fulfillment. I am happy to have the opportunity to show this in a way that survives beyond my death.

Have you ever thought about making such a gift yourself? Have you thought of a planned gift as a way to fulfill your stewardship of treasure? If not, I ask you to consider it. What, you may ask, is the concept of “Planned Giving?” It can be a confusing term and it is often misunderstood. Very simply, planned giving describes a donor's commitment to transfer capital assets to a qualified religious, educational or charitable organization. More often than not, a planned gift is made by means of a formal agreement or contract. Planned gifts are normally made from the donor's accumulated wealth as part of an overall estate plan. It frequently results in significant tax advantages to the donor. The most common form of a planned gift is a bequest provision in a will.

Many people, when asked, say they would like to consider making a special planned gift to their parish, Catholic school or favorite diocesan ministry. While the idea may have a strong appeal, they often wonder how they should proceed and when would be an appropriate time to act. A good time to consider such a gift is at the beginning of a new year, as tax season approaches, or when a major change takes place one's life.

We may wonder why we do not often hear about planned giving as Catholics. In comparison to other religious and nonprofit organizations planned giving is relatively rare in the Catholic Church. Part of the reason is that we do not talk about it as much as we could, or should. Another reason is that many Catholics associate a bequest in a will to their parish church with Masses to be said for the repose of the donor's soul. Any bequest to a parish church will only involve Masses, if such designated language is written in the Will. A bequest to a church can be expressed with whatever designation the donor chooses. Please know that a simple and clear designation in the will carries the power of law – and must be adhered to at the parish level and beyond.

Given today's ever changing family and shift in personal wealth, we are invited, as Catholics, to devote ourselves perhaps to a more thoughtful approach to estate planning. Your parish church is a worthy object of your generosity. Your church will remember you with gratitude in its prayers. Beyond your parish church there are many Catholic causes which are equally deserving of your bounty. Please give thought to a planned gift. It is a beautiful thing to do.

—By Father Alexander Bradshaw

The information in this article is not intended as legal advice. Independent counsel is highly recommended.

Estate Planning Questions & Answers

1. Do I need to make a will?

Every adult should have a will.

2. If I already have a will, are there other factors to consider?

An existing will should be reviewed regularly to ensure that it meets all present needs and specific plans to manage and distribute your property. If your spouse or other heirs have died, you should have your plans reviewed by an experienced professional to determine the impact of these changes. Such a professional can also provide advice on the often changing federal and state laws that govern wills and estates.

3. What happens if I move to or from another state?

As laws vary by state it is most important that your will be reviewed as soon as possible by a professional that resides in your new state of residency.

4. What are the key benefits to estate planning?

As you work your way through important family and financial matters, remember that there are Planned Giving opportunities that could benefit you, while at the same time

giving a benefit to others, whom you may wish to favor. Your estate may benefit significantly from the charitable deduction. Bear in mind, that making a gift in your will demonstrates a profound sense of caring and a spirit of generosity. It also encourages a tradition of giving, a family philanthropy, which continues to future generations.

5. How can I make a planned gift in my will to my parish or ministry?

The most common vehicle is a bequest in a will, in which you decide to remember the Church by setting aside a stated amount, a specific asset, or a percentage of your estate. The terms of the gift can be changed at any time by an amendment to your will.

6. Are there other considerations?

Think of the opportunities a planned gift provides for memorializing a loved one. Donations can be made to the parish for general purposes or they can be designated to specific projects or programs. Please consider the future needs of your parish, Catholic school or a special ministry of the Church. Your actions now will make a difference and they will help to promote the mission of the Church for generations to come.

Planned Gift Policy

The Diocese of Rochester and its entities will respect the wishes of any donor to the extent that they do not interfere with the mission of the Church. Funds designated or restricted to a particular area will be used for the specified purpose.

For more information, please refer to the Diocesan Gift Acceptance Policy (2002).

How to Word a Bequest

THREE TYPES OF BEQUESTS

A bequest is a gift to your favorite parish, school or diocesan organization through your Will or Estate Plan. There are three types of bequests:

Specific

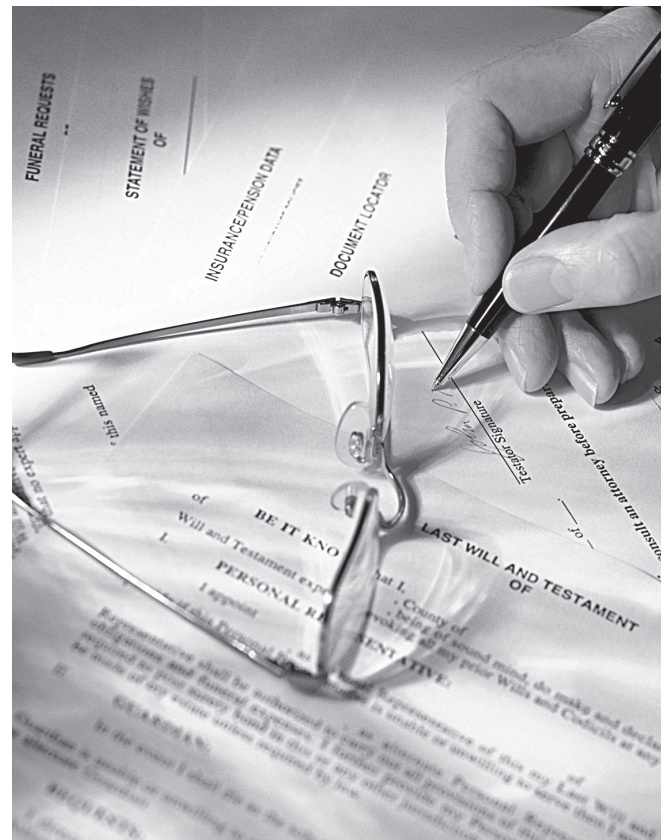
This is the most common type of bequest. Typically it is a dollar amount like \$10,000 or some other specific asset like appreciated stock. Here is sample wording for a specific bequest:

“With gratitude for all that God has given me, I give, devise, and bequeath to _____ Parish {city}, {state} a/an {state} religious corporation, the sum of \$ _____ (or description of specific property).”

Residuary

This type of bequest gives all or a specific percentage of assets remaining in the estate after debts, taxes, expenses and other bequests have been paid. Here is sample wording for a residuary bequest:

“With gratitude for all that God has given me, I give, devise and bequeath to _____ Parish, {city}, {state} a/an {state} religious corporation, 10% of the remainder of my estate after all debts, taxes, expenses and family bequests have been paid.”



Contingent

This bequest takes effect if those you have remembered in your Will are no longer living when you pass away. Here is sample wording for a contingent bequest:

“If upon the death of the survivor of my spouse and I, or at any time thereafter, but prior to complete distribution of my estate, there is no living descendant of mine, any property of my estate not vested or effectively appointed shall be distributed to: _____ Parish, {city}, {state}, a/an {state} religious corporation.”

Planned Giving Messages

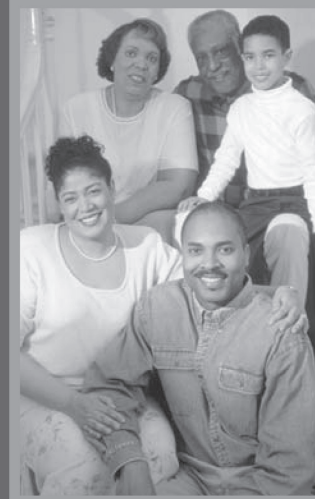
For use in any or all of your communications...
Bulletins, Newsletters, Web sites or Special Appeals.

- Preparing an estate plan is good Christian stewardship - saying thanks to God, expressing your love for family, and showing charity toward others.
- When your attorney prepares your estate planning documents, you can include your church as the final beneficiary to receive remaining benefits after other beneficiaries are remembered.
- Proper estate planning can reduce administrative time, expense and inconvenience. Careful estate planning can also be one of the best gifts you give your family.
- Good stewardship requires us to think of the future. Have your estate plan prepared now and express your good stewardship in ways that will bless your family and your church.
- Who needs estate planning? Every adult who is legally competent, who owns anything and cares about who receives it at the time of his or her disability or death.
- Grandpa didn't have a will, but Grandma does. She had to settle Grandpa's estate without one, and she now knows how important a will really is. Do you have a will?
- Your gifts to your church are a testimony to your faith and the confidence you have in your church. Both lifetime gifts and testamentary (those that are given through your will) express your feelings in a meaningful way.
- You can share your faith beyond your lifetime by careful estate planning that includes your church in your will. During your lifetime you will have the joy of knowing that whatever you do not use in this life will continue in ministry through your church after your death.
- Have circumstances changed since you last updated your estate plan? Do your current estate planning documents carry out your commitments to your church?
- "Later" can be too late. Don't delay having your will drawn. Make sure your estate plans are in place so that your wishes will be carried out to benefit your family. Gifts you plan for your church through your will can help your church continue to minister and serve.
- At the death of a special friend or relative you might like to remember that person through a memorial gift to your church. This will show your appreciation for this treasured relationship and help others through the church. An acknowledgment card will be sent to the surviving family, letting them know of your gift, without disclosing the amount.
- How long has it been since you updated your will? Does it still express your wishes? Does it leave a gift to your church to carry on its ministry after your death?

Please remember your church in your will.

More messages on Planned Giving can be found online at: www.dor.org/sd.

Advertising Sample #1



As a faithful steward, you have supported your Church through your prayers, involvement and financial resources. A gift from your estate can be a lasting profession of your love for your brothers and sisters in Christ. The future of our Church will be much brighter because of your commitment today.

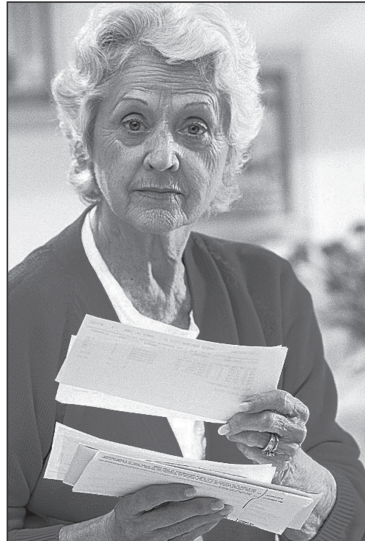
Fulfill your dreams of stewardship through an act of faith.

{YOUR PARISH LOGO, NAME AND CONTACT INFORMATION HERE}

To customize this ad for your parish contact the
Stewardship and Communications Office.

Advertising Sample #2

Income for Life!



**Would You Like To
Benefit Your Diocese
(Parish, School,
Catholic Charities, etc.)
and Receive a
Guaranteed Income
for Life?**

**If so, a *Charitable
Gift Annuity*
May Be Just Right For You!**

What is a Charitable Gift Annuity (CGA)?

A CGA is a contract between you and the Diocese of Rochester in which you transfer ownership of cash, securities or other assets and receive a *guaranteed fixed payment* for life. Upon your death, the remainder of your gift is distributed to your parish, school, or diocesan ministry.

One-Life Annuity Rates*

Age	Rate
65	5.3%
70	5.7%
75	6.3%
80	7.1%
85	8.1%
90+	9.5%

*Minimum Gift \$10,000
Rates effective 02/01/09

YOUR PARISH LOGO

PARISH NAME AND

CONTACT INFORMATION HERE

Sample Letter #1

Targeted Parishioner's Name
Street Address
City/State/Zip

Dear _____

Since its founding over _____ years ago, the mission of _____ defines it's essence. (insert mission statement)

Although each generation has faced its own unique challenges and opportunities in helping to fulfill this mission, one challenge –indeed duty– is shared by each generation: to faithfully hand on this mission, and to make it possible for the next generation.

In a very practical way, the future of _____ is being built on, and will be sustained by planned giving – the intentional sharing of things we have accumulated over our lifetime. By doing so we make a profound statement that our commitment to _____ was a significant priority during our lifetime. As a result, _____ will continue to fulfill its mission into the future.

Thank you for prayerfully considering the information contained in this letter/packet/etc. May God bless you always for your gifts of treasure that will allow our _____ legacy to be passed on for generations to come.

Sincerely,

Pastor / Pastoral Administrator

Sample Letter #2

Joseph & Mary Smith
1234 Heavenly Way
Anytown, NY 14600

Dear Joe & Mary,

I am writing to thank you for your long and continued membership in _____ Parish. As faithful parishioners you have assisted in the Lord's work by helping to build our faith community. Your stewardship of time, talent and treasure over the years is commendable and much appreciated.

I am also writing to ask you to take a look at some ways of extending your legacy so that the good work you have started/contributed to will continue for generations to come.

Enclosed is a brochure that summarizes the basics of Planned Giving and the key benefits of several types of gifts. This includes the most popular way – making a bequest in one's will.

I hope that you find this information helpful. Please contact me (or _____) at the parish office if you would like more information or would like to schedule a meeting at your convenience.

I ask that you prayerfully consider this stewardship opportunity to help advance the mission of our Church/Parish/School/Ministry.

Yours in Christ,

P.S. If you have already included _____ Parish, or any other diocesan entity, in your estate planning – thank you very much. Please note that the diocese has established **The Most Reverend Dennis W. Hickey Society** to recognize those individuals who make provisions in their estate plans for God's work. If you would like, I can forward your name to be included in the Hickey Society.

Stewardship & Communications Office

Our staff is available to:

- Make presentations to staff and leadership volunteers interested in promoting planned giving for the benefit of your parish.
- Provide resources on planned giving topics specific to a donor's interest.
- Review solicitation materials and offer suggestions for consideration.
- Prepare charitable gift annuity illustrations and implement contracts.
- Help identify other professionals (attorneys, accountants, financial planners, etc.) willing to assist with estate planning and planned giving presentations to prospective donors.



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STEWARDSHIP

FOR ADDITIONAL INFORMATION, PLEASE CONTACT:

Stewardship & Communications

Diocese of Rochester, 1150 Buffalo Road, Rochester, NY 14624

(585) 328-3228 x1297, email stewardship@dor.org

or visit: www.dor.org/sd

The information in this publication is not intended as legal advice. Independent counsel with one's attorney, accountant, tax consultant and financial planner is recommended.