



## **Planned Giving Suggested Marketing**

1. Bulletin announcements
  - a. Planned Giving or Endowment funding awareness
  - b. How were the distributions used?
2. Pulpit announcements or homilies on stewardship (mention the endowment)
3. Create an awareness of resources at the Catholic Foundation of Northeast Kansas (CFNEK)
  - a. Annual Letter from pastor reminding parishioners 65+ of updating their will, even during capital campaigns, include free CFNEK Estate Planning kit (This is informational not a solicitation for funds.)
4. Publicize planned gifts received and how the money was used
  - a. Include money from each funeral, baptism and wedding
5. Start or promote a parish endowment
6. Provide bequest language for gifts to your endowment to all local funeral directors
  - a. Let parishioners know that funeral homes have this information
7. Personal donor introductions to CFNEK to help with complex tax and estate questions
8. “Wills and Bequests” seminar presented by the CFNEK
9. Planned giving talks to existing groups that meet regularly i.e. Knights of Columbus, PTO, and Alter Society
10. Pulpit announcements after daily mass
11. “Remember the parish in your will or trust” tagline under weekly offering amount in bulletin
12. Form an active Legacy Society
  - a. List of individuals who have included the parish in their will, trust or life insurance
  - b. Quarterly Pastor Tea/Brunch to promote the group and recognize donors